



## The Group Wellness Coaching Manual

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## Welcome!

This training was developed for Real Balance Health & Wellness Coach certificants to learn the essentials of wellness group coaching and to apply the unique and powerful Wellness Mapping 306° model in groups.

In this training you will draw upon your knowledge of core coaching concepts and skills, behavior change and the Wellness Mapping 360° methodology. Building on that base, you will acquire new skills for the design and delivery of wellness groups. Participants in this training are from many different professions and venues. We will look at the application and delivery of wellness groups within the organization and as an independent wellness coach.

***This course is intended to model the group coaching experience as much as possible within the context of the training.*** Experiencing the process, sharing of yourself and supporting others are very important and highly encouraged. Both the design and delivery of a wellness group draws upon your creativity whether you are designing a group from scratch or from an established structure. You will have an opportunity to brain storm and share your thoughts and ideas with fellow participants in class and out. As a learner, your openness to your own journey and the co-active discovery process will be a key to the richness of what both you and your classmates take away from this training.

You are always free to choose what you want to share. What you do share will be kept within the confidential and professional boundaries of this course and your agreement with this is required.

We invite you to communicate with your instructor, share your experiences, and contribute your wellness and professional expertise. We invite you to dive in, and to have fun with this!

We are all allies for a healthy world!

Thank you,

*Dr. Michael Arloski & Annalise Evenson*

## What You Need to Know

### Course Purpose

To further develop your skills and expand your scope of practice as a Health and Wellness Coach. In this 28 hour training, Health & Wellness coaches will learn the core concepts of group coaching and how to effectively use the Wellness Mapping 360° model with groups.

### Skills Required to Successfully Conduct a Wellness Coaching Group

An understanding of:

- Core Coaching Skills as Applied to Group Coaching
- Group Dynamics & Process
- How Adults Learn
- Integration of Experiential Learning and Education
- Group Design Skills
- Group Facilitation Skills
- Dealing with Challenging Situations
- *Best Practices* for Group Coaching

### Training Outcomes

- Participants will gain or demonstrate knowledge of the application of core coaching skills to group coaching.
- Participants will gain or demonstrate knowledge of group dynamics & group process.
- Participants will gain or demonstrate knowledge of adult learning, experiential learning & best practices in group coaching.
- Participants will have a foundation in the essential concepts for creating and implementing effective health/wellness coaching groups.
- Participants will gain or demonstrate knowledge of the integration of behavior change theory and the Wellness Mapping 360° Methodology into group coaching.
- Participants will gain or demonstrate knowledge of design and evaluation of a Health/Wellness Group.
- Participants will gain or demonstrate knowledge of dealing with challenging situations in group coaching.
- Participants will gain knowledge in the hands-on design and delivery of a Group Wellness Coaching Session.

## Requirements to Complete this Course

- Completion of 28 in-class hours. Up to 4 hours of missed class time may be made up by listening to the class recording and completing a brief questionnaire that is submitted to [Annalise@RealBalance.com](mailto:Annalise@RealBalance.com).
- **3 Buddy Sessions** 3 collaborative sessions focused on sharing ideas, brainstorming and giving each other feedback. The collaborative sessions should follow chapter 3, 4 and 7 or 8. Refer to Appendix A for the Collaborative Session Guidelines and requirements to complete and submit a Collaborative Session form following each session.
- Completion and submission of a **Health/Wellness Group Plan** submitted to [Annalise@RealBalance.com](mailto:Annalise@RealBalance.com). Refer to **Appendix A** for a description of the requirements and the required forms to submit.

## Materials & Books: Required & Recommended Reading

### Required Reading:

- *Wellness Coaching for Lasting Lifestyle Change*, Michael Arloski, PHD, PCC
- *The Group Wellness Coaching Manual* (will be provided for you)
- *Paths of Wellness Guided Journal*, Michael Arloski, PHD, PCC
- *Effective Group Coaching*, Jennifer J. Britton, 2010, John Wiley & Sons Canada, Ltd.

### Recommended Reading:

- *Co-Active Coaching*, Henry Kimsey-House, Karen Kimsey-House, Phillip Sandahl & Laura Whitworth
- *Group Coaching, A Comprehensive Blueprint*, Ginger Cockerham, MCC, CMC, 2011, iUniverse, Inc, Bloomington, IN
- *The Kaizen Way*, Robert Maurer, Ph.D, 2004, Workman Publishing, NY
- *Taming Your Gremlin*, Rick Carson, 2008, Collins An Imprint of Harper Collins Publishers, NY

### Recommended Review Reading for Real Balance Alumnae:

- *Health and Wellness Coach Certification Training Manual (2014)*

### Reading for Class I

- *The Wellness Mapping 360° Group Coaching Model Manual* - Preface and Chapter 1
- *Effective Group Coaching*, Jennifer J. Britton, Chapters 1 & 2

### Recommended Review Reading:

- *Wellness Coach Certification Training Manual* - Chapter 3 “The Coaching Alliance” & Chapter 4 “Readiness for Change”

## Navigating the Manual – Layout

This manual is divided into 10 chapters. The first page of each chapter defines the contents of that chapter including:

- **Key Concepts**
- **Connections to Be Made for the Group**
- **Applications**

At the end of each chapter you will find:

- **Homework (for the Chapter)**
- **Additional Resources**

## Appendices

There are two Appendices with group development tools, assessment and group exercise tools.

### Appendix A – Group Development Tools

- Appendix A (the Cover page)
- Coaching Skills Self-Assessment
- Collaborative Sessions Guidelines
- Collaborative Sessions Notes Form
- Group Practicum Planning Guide
- Group Practicum Feedback Form
- Example of a Mind Map
- Group Coaching Vision Development Tool
- Third Party Considerations Form
- Know Your Client Assessment Tool
- Group Focus Design Tool
- Group Venue/Structure Design Tool
- Group Evaluation Tool
- Overview of Group Coaching Plan Requirements
  - Group Coaching Design Plan - Part I
  - Group Coaching Design Plan - Part II
  - Group Coaching Design Plan - Part III
  - Group Coaching Design Plan - Parts IV & V
- Group Design Example 1
- Group Design Example 2

### Appendix B - Assessments, Exercises & Tools

- Strengths, Challenges, Opportunities & Barriers Tool
- Hopes, Fears & Fantasies Exercise
- The Miracle Question Exercise
- Your Wellness Logo Exercise
- Hot Air Balloon Visualization – Perspective
- Crossing the Line Closure Exercise
- Leaving Behind/Moving Towards Closure Exercise







## ***Chapter 1***

# **The Group Coaching Essentials**

### **Key Concepts**

- What wellness group coaching IS and IS NOT
- Advantages & disadvantages of group coaching
- Components of effective wellness coaching
- The group coach's role

### **Connections to Be Made for the Group**

- The transition from coaching one to coaching many
- The integration of wellness principles & practices

### **Applications**

- Knowing how wellness group coaching is different than other forms of group process
- Integration of core coaching skills & practice
- Integration of core wellness concepts & practices

## What Is Group Wellness Coaching?

When we think of a group of people we are likely to imagine a gathering of individuals. In today's world a gathering can take place in person or virtually. Technology affords us the ability to meet via the internet, telephonically or both. Webinars, social media and Skype have all opened the possibility for being a member of a group without the limitation of time or geography.

To belong to a group is to join a *collection of people, who interact with one another, accept rights and obligations as members and who share a common identity*. But what is the common identity that differentiates a coaching group from other types of groups? In a nutshell, coaching gives us a framework and a methodology that allows us to work with change on a personal level, an organizational level and/or a relationship level. Equally important, it facilitates and promotes opportunity for the other complementary force at play when there is change – discovery and learning. From this lens, group coaching may be seen as the application of coaching methodology with a specific collection of people who share a common intention for change in their lives. In the group process, the members, collectively and individually, become catalysts for change for one another.

*“Group Coaching [is] a small group process throughout which there is the application of coaching principles for the purposes of personal or professional development, the achievement of goals, or greater self-awareness, along thematic or non-thematic lines.”*

**Jennifer Britton**

*“...a facilitated group process that is led by a professional coach and formed with the intention of maximizing the combined energy, experience, and wisdom of individuals who chose to join in order to achieve organizational objectives and/or individual goals.”* **Ginger Cockerham, MCC, Group Coaching: A Comprehensive Blueprint, 2011**

Now if we add wellness coaching into the mix, *what we know is that wellness coaching is the application of the principles and processes of professional life coaching to the goals of lifestyle improvements for higher levels of wellness*. So putting it all together, for our purposes, we define Health and Wellness Group Coaching as a ***wellness lifestyle improvement process in a group format, which may have a single or multiple wellness theme(s); has an overall intention of creating a ‘community of wellness’ within the group; includes both action and accountability; and creates opportunity for self-discovery and learning.***

### What It Is NOT

Group coaching is a relatively new form of group work and coaching practice. It is easy to confuse it with other types of group work. Group Coaching is not:

**1. An educational class** such as:

- A class that includes some group processes.
- A skills training involving some facilitation skills on the part of the trainer.

But it may integrate education with coaching - For example, if you are a health/wellness coach who wears 2 professional hats, you may want to include some education related to your area of expertise.

**2. Group therapy** - Coaching groups are not a place to “work out your issues”, solve emotional problems, heal old wounds of the past or treat any kinds of addictions, abusive or pathological behaviors.

But it may include “Process Coaching” - As coaches we notice currents below the surface, acknowledge feelings and may explore the internal experience of the client(s) in the present, tying it to the client’s efforts to improve their lifestyle and their way of living.

**3. A mentor program** involving dialogue between mentor and mentee(s).

But it does include “Group Process” - As the group members evolve into a unique, interacting organism there is sharing of personal experiences and feedback among one another.

**4. A team-building exercise** designed for an organization such as a business or medical establishment.

But it may include experiential learning - Exercises designed to facilitate group process and ‘deepen the learning’ through interactive exercises.

**5. A Support Group** whose primary focus is for group members to help each other along a difficult life journey or through a challenging time.

But it does provide support - Both the coach and group members are an ‘ally’ for each group member. Indeed the group itself becomes an ally!

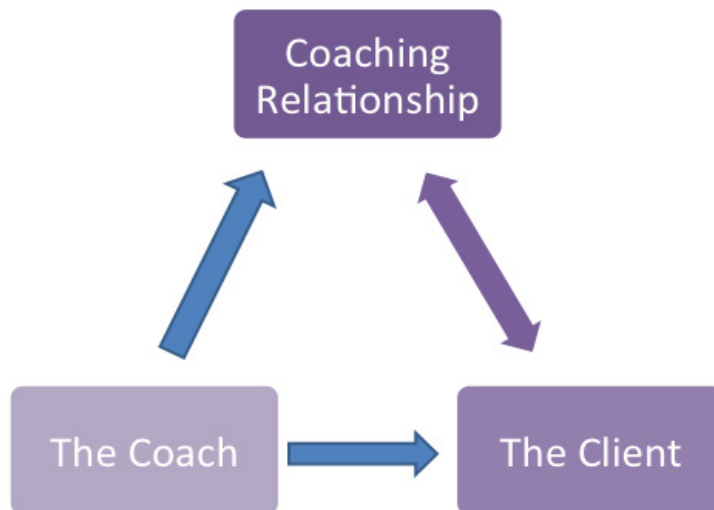
## What Distinguishes Group Coaching from Individual Coaching

### The Coaching Relationship

Powerful coaching is about the power that the client experiences. That power is generated from the coaching relationship – from the synergistic energy that is created between client and coach. The client brings their desires, motivations and inner wisdom. The coach brings commitment, coaching skills and behavioral change expertise along with the ability to ‘see’ the client for who he or she truly is – naturally creative resourceful and whole – a hero on a hero’s journey – and so much more than their behaviors, habits, thoughts, beliefs and feelings.

Both the coach and the client empower the relationship. It is the coaching relationship that empowers the client. Trust is built, clients are willing to take risks and to create forward movement when both coach and client can ‘lean into’ the relationship.

#### The One-on-One Coaching Relationship Empowerment Triangle

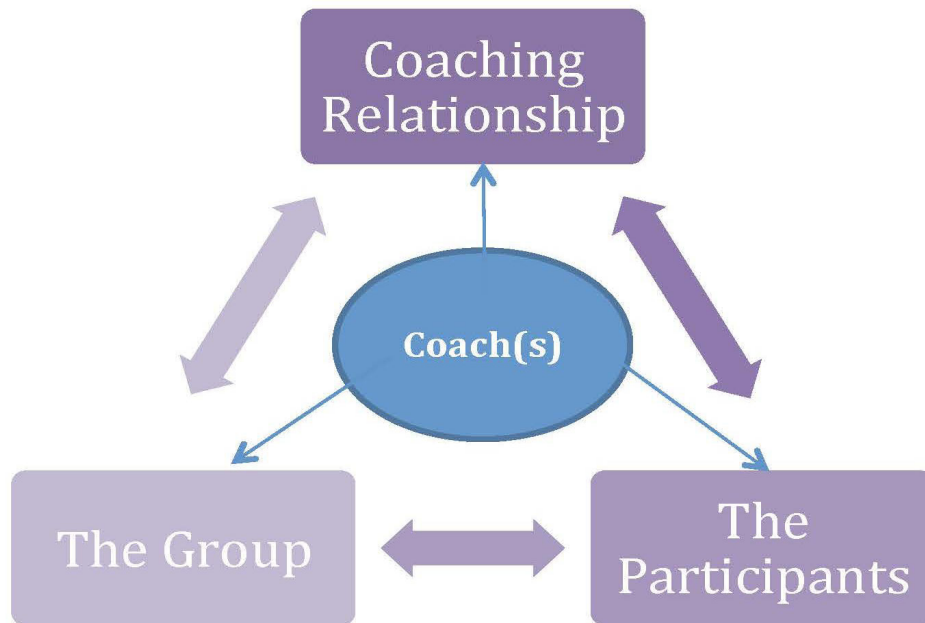


**In One-on-One Coaching the relationship has three distinct components:**

1. The client
2. The coach
3. The coaching relationship

Both the client and coach empower the relationship – the relationship empowers the client.

### The Group Coaching – One to Many – Relationship Empowerment Triangle



**In group coaching the relationship has four distinct components:**

1. The coach
2. The group
3. Each participant
4. The coaching relationship

In group coaching both the 'group' (the sum of the parts) and each participant (the members contributing to the whole) have a separate and unique identity. The group itself takes on a unique persona. The power from the coaching relationship is generated from the synergistic energy of the group, each participant and the coach(s). The coaching relationship empowers the individual participants and the group as a whole. A mighty powerful force!

## The Whole Is Greater than the Sum of the Parts

The impact of powerful questions, support, wanting to be viewed positively by fellow group members, having the opportunity for shared experiential learning, and feeling like a part of something bigger than oneself can have an exponential impact.

- Powerful questions, even if directed at one participant, often stimulate self-discovery for the group as a whole
- Curiosity is generated by fellow participants
- Participants may feel a sense of accountability to both themselves and to the group
- Participants may partner in pairs or small groups for experiential learning
- Participants may ‘buddy up’ outside the group for support in between sessions and on-going even after the group ends

## The Opportunity for Co-Coaching

The group setting provides an opportunity for the coach to share the work and enhance the coaching experience for the participants by having co-leaders. Possibilities include:

- Two co-lead coaches who are both wellness coaches
- One wellness coach and one Subject Matter Expert (SME) co-facilitator with specific health care/wellness expertise
- One Coach and more than one SME (who participate at different sessions)

## The Benefits of Group Coaching — Why Go with a Group?

### Advantages for the Coach

There are significant opportunities for you as a coach to enhance your practice, maximize time efficiencies, and share responsibility with a co-lead.

Advantages may include:

- **Reach more people** per hour of coaching
- **Obtain greater pay** per hour of coaching
- **Built in referral/recruitment.** When a group is designed for an organization, some clients that might not come for individual coaching may be attracted to a promoted group.
- **An introduction to coaching** for individuals that may lead to individual coaching. Group members may want to continue coaching one-on-one with you.
- **Greater flexibility** in format and time: Weekly, bi-weekly meetings, single or multi-day retreats.
- **Working with a partner** (co-coach or co-facilitator) allows you to share the work, bring different strengths, insights and styles to the coaching, potentially add Subject Matter Expert (SME) expertise, learn from each other, add synergies to the group and increase the coaching listening power.
- **Increase potential to work for/within an organization.** More companies do not question ROI for group process as opposed to one-on-one coaching. They see a greater return in less time and cost.



- **Establish yourself as an ‘expert’** in a particular area.

### **Advantages for the Clients**

There are enormous benefits and economies to be realized by the clients including:

- **Shared Challenges.** Clients who share the same health challenge (i.e. diabetes, HIV/AIDS, heart-surgery recovery, etc.) can give each other support and supreme empathy: “I’m not the only one!”
- **Increased Scope of Support.** Clients can get support from the coach(s) as well as group members.
- **Group Synergy.** Clients benefit from the perspectives of others and group process can lead to creative solutions.
- **Push the Envelope.** A group provides the opportunity for members to challenge one another in a natural way; in coaching parlance, to call each other forth!
- **Connectedness.** The group becomes a support system and helps members reduce reluctance to reach out to others for more support.
- **Finding Meaning.** The opportunity to identify with something bigger than oneself and feel a part of the wellbeing of the group members
- **Cost-Efficiency.** Cost is lower to the client. If cost-sensitive, a client may be able to engage in coaching and/or continue longer than they could in individual coaching.
- **Group Accountability.** The members are held accountable to ‘the group’. This may be even more powerful than in individual coaching.
- **Making it Last.** There is an opportunity to maintain ongoing relationships for continued support & connection.

### **Unique Challenges of Group Coaching**

#### **1. The Coaching Presence**

The group coaching experience, unlike that of working one-on-one, requires an expanded coaching presence. The coach must have an awareness of each participant individually and of all participants globally. Additionally the coach must be attuned to the group energy and its impact on the dynamics and direction of the group.

#### **2. Time Management**

The coach must be attentive to time and ensuring that there is adequate time for key activities and that all participants have an opportunity to share and to be heard.

#### **3. Challenging Situations**

The coach must be willing and prepared to deal with challenging interactions among participants as the group evolves or with possible external disruptions that impede the forward movement of the group.

## Key Components of Effective Wellness Group Coaching

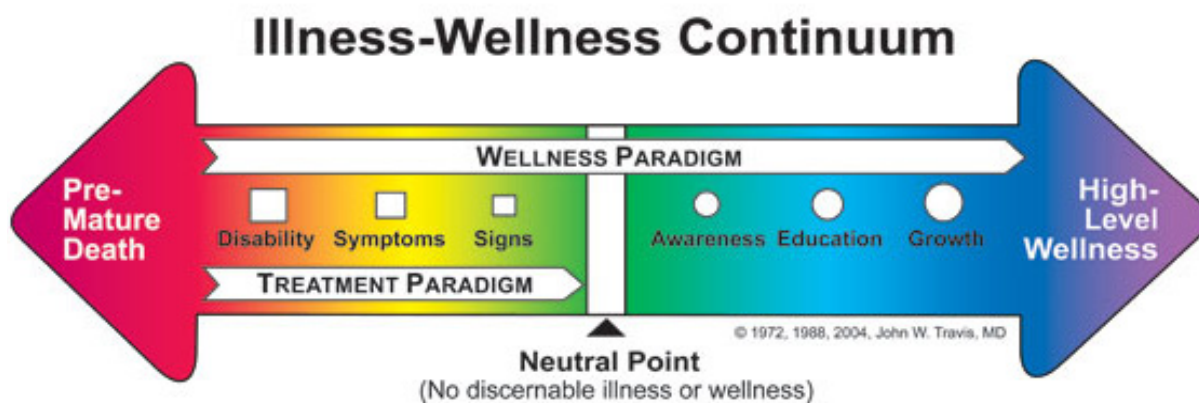
A very important feature of Group Wellness Coaching that distinguishes it from other types of group coaching is the integration of core health and wellness concepts, behavioral change theory (both the neuroscience of change and the TransTheoretical model of stages of change) and potentially the need for some level of knowledge or awareness of medical conditions and challenges.

Equally important is the integration of the core principles of coaching, and coaching skills now applied to the group experience. Following are six key components of effective wellness group coaching.

## The Wellness Paradigm - Movement towards Wellness

- **John Travis' Wellness Continuum**

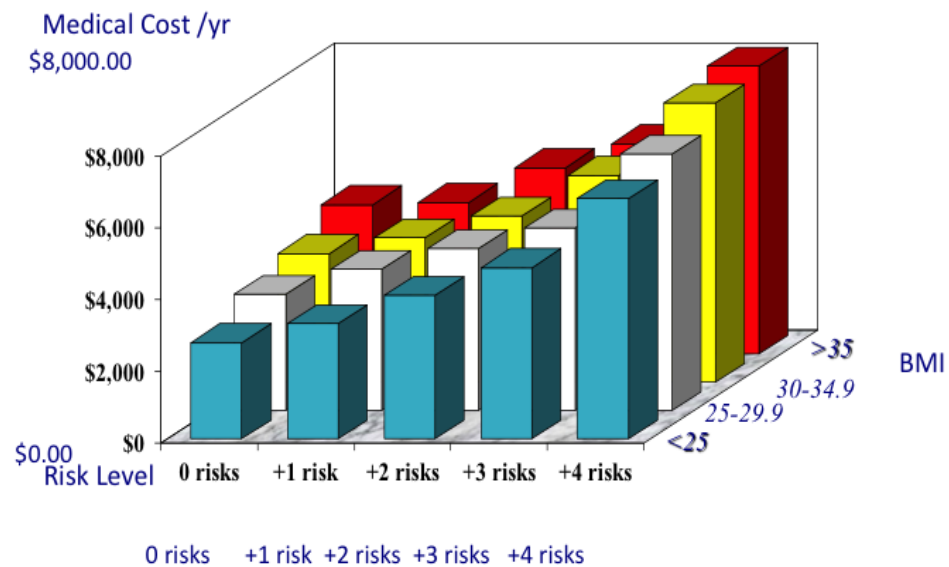
The key concept for the wellness group coach to draw upon as the foundation for any health/wellness group is that wellness is a process that involves the whole being and calls for options, individuality and conscious choices. The Travis Illness–Wellness continuum provides an understanding of wellness as a state of mind, a course of action and a journey that is separate and distinct from physical illness or health, but will nevertheless impact the course of illness to health or health to illness. The coach's intention for the group and for each participant is movement towards wellness.



- **Musich, Lu, McDonald, Champagne and Edington's 'Phenomenon of Migration'**

Their research on at risk populations provides critical evidence that supports the Travis imperative for movement in the direction of wellness. When individuals are not pointed towards wellness:

- Already at risk individuals tend to migrate toward increased risk factors and becoming high risk; and
- Low-risk individuals who do not get help maintaining that low-risk status WILL BECOME tomorrow's high-risk population; and
- The cycle will never end.



Musich, Lu, McDonald, Champagne, Edington. AJHP. 18(3):264-268.

- **Questions to Consider for Group Coaching:**

- Where are the group participants along the wellness continuum? And even more importantly, what direction are they facing now?
- Are group members physically ill and oriented towards wellness?
- Are group members physically healthy and functioning from an illness mentality or moving towards physical illness?
- Where is the group overall along the continuum – is there a theme?

## The Science of Behavioral Change

- **Prochaska and the TransTheoretical Model (TTM)**

According to James Prochaska, “successful self-changing individuals follow a powerful and perhaps most important, controllable and predictable course.” His research points out that 20% of a problem population are prepared to change at any given point yet more than 90% of behavior change programs are designed only for that 20%. His model has demonstrated that even people who are not ready to change habits/behavior can set the change process into motion; the key is to know your stage of readiness. Equally important is assessing every area of focus for change in terms of readiness. Just because one is ready for action in one area does not mean they are at the same readiness for change for other areas. As a group coach, you don’t want your group to be part of the 90%, in a group that is oriented towards success for only 20% of its members or worse, none at all. Your success and that of your group must be grounded in the understanding and application of the TTM.



- **The Intersection of Tracking & Accountability with the Neuroscience of Change**

The emerging understanding of neuroplasticity is providing us with a new awareness of neurogenesis in the brain and how the brain literally ‘rewires’ itself with new neuro-pathways as new behaviors are cultivated and become habit. Understanding how the brain changes itself is underscoring the criticality of small, consistent repetitive new behaviors to effect change (the Kaizen principle). Behaviorists know that tracking is the best empirical way to know a change is taking place. Tracking gives us evidence of change in progress that is measureable. Hand in hand with tracking is accountability. Accountability provides a critical impetus for tracking and staying on target. It also opens the door for exploration, discovery and learning when the client commitment is met and when it is not met.

- **Questions to Consider for Group Coaching:**

- Will your group design focus on a ‘collective’ stage of readiness across all participants?
- How will you know the stage of readiness for each participant? How will they know?
- How will the stage of readiness of the members impact the group experience?
- What forms of tracking can the group use? Can each participant use?
- How will the group establish and use accountability?
- Would an understanding of how the brain changes itself (neuroplasticity) be helpful to group participants?

## Positive Psychology & Facilitative Conditions for Coaching

*“Positive psychology is concerned with the scientific study of optimal functioning, focused on aspects of the human condition that lead to happiness, fulfillment, and flourishing, with core positive psychology research topics including happiness, wisdom, creativity and human strengths.”* **Stephen Palmer & Alison Whybrow, Handbook of Coaching Psychology**

## Carl Roger’s “Client –Centered” Approach

We know from Carl Rogers that where there is complete acceptance and no judgment and where the client experiences empathic understanding – THAT is a facilitative relationship. The heart and soul of coaching is more about the relationship than anything else. In groups the coach must establish that facilitative relationship with all participants, model it for the group and help participants to interact in the same way towards one another.

## Maslow’s Hierarchy of Needs

Self-actualization, achieving our dreams and desires, finding meaning and purpose is where we all want to be. And sometimes when ‘life happens’ we find our lives turned upside down and inside out and focused somewhere else along our hierarchy of needs. Life’s setbacks, challenges and related fears may be the reason participants find themselves in your group. Challenges and setbacks may also show up during the course of the group in new or different ways. As the coach you want to be cognizant of where participants are along the hierarchy of needs, of shifts that occur (up or down) and what the impact is to the one and to the many.



### **Questions to Consider for Group Coaching:**

- How can you be instrumental in promoting facilitative relationship among participants?
- What is the impact if the facilitative conditions are absent?
- Where does each group member fit in the 'hierarchy of needs' pyramid?
- What challenges/opportunities will different positions on the pyramid create for the group experience?
  - With the group as a whole at the same position?
  - With different members at different positions?

### **A Basic Understanding of the Disease or Illness Involved**

If you are going to coach a group with a specific health focus or participants who have a specific diagnosis, health challenge or symptomology you need to consider whether having relevant knowledge is important. And if so, how much knowledge is necessary and how will it serve you in the context of the group.

### **Questions to Consider for Group Coaching:**

- Do you need to know about the course of a disease? Or its symptoms?
- What do you need to know about the disease? A '101' class or greater expertise?
- What will that knowledge give you? How will it impact the group?
- If you do not have the knowledge/awareness you believe is necessary, would having a co-facilitator with specific subject matter expertise (SME) be desirable and/or acceptable?

## The 4 Cornerstones of Co-Active® Coaching

The way we see our clients determines all of our interactions with them. The way we view the coaching process from a fundamental and philosophical perspective affects every bit of coaching we do.

CORNERSTONE	SIGNIFICANCE FOR GROUP COACHING
<b>People are naturally creative, resourceful and whole</b>	<p>Recognizing each person in the group as a hero on his or her own unique journey.</p> <p>Recognizing that each person in the group is not just his or her thoughts, beliefs, feelings, behaviors or habits.</p> <p>Recognizing the ‘group’ as naturally creative, resourceful and whole.</p> <p>Recognizing your co-leader as naturally creative, resourceful and whole.</p>
<b>Focus on the Whole Person</b>	<p>Recognizing that each client has a <i>Big Whole Life Wellness Agenda</i> and smaller agendas in service of their whole life wellness agenda.</p> <p>A small agenda – specific goal(s) - is truly like a microcosm for the client’s whole life.</p> <p>The group can help clients work on smaller agendas and shine the light of awareness on how one small thing can impact or influence other aspects on one’s life.</p> <p>Awareness that when one dimension of the client’s life shifts – all dimensions may be and often are impacted as well.</p>
<b>Dance in the Moment</b>	<p>Listen to each participant – notice body language.</p> <p>‘Listen’ more to the whole environment. Notice the energy – what’s not being said.</p> <p>To ‘Dance’ is to respond to the whole – the individual participant’s lead – coach leads less – and the group begins to take on a dance (life) of its own.</p> <p>Coach notices what and who is leading.</p> <p>Coach notices the shifts.</p>
<b>Evoke Transformation</b>	<p>Listen for key nuggets &amp; themes.</p> <p>Where can curiosity or a powerful question create new awareness?</p> <p>Where can your reflection take the group deeper?</p> <p>Where can your silence create an opening in the group?</p>

## ICF Coaching Core Competencies

The 11 core competencies that were developed to support greater understanding about the skills and approaches used within today's coaching profession are equally relevant and applicable in the group coaching arena.

COMPETANCY	SIGNIFICANCE FOR GROUP COACHING
<b>Setting the Foundation</b>	<ol style="list-style-type: none"><li>1. Bringing ethical guidelines and professional standards into the group</li><li>2. Establishing the coaching agreements with the group</li></ol>
<b>Co-Creating the Relationship</b>	<ol style="list-style-type: none"><li>1. Bringing in the coaching presence</li><li>2. Establishing trust and intimacy that each group participant can depend on<ul style="list-style-type: none"><li>• Establishing a group trust and intimacy that allows the group to evolve to its most effective level of interaction</li></ul></li></ol>
<b>Communicating Effectively</b>	<ol style="list-style-type: none"><li>1. Active listening:<ul style="list-style-type: none"><li>• Listening to the group energy</li><li>• Listening to the individual participants</li></ul></li><li>2. Powerful questions<ul style="list-style-type: none"><li>• Knowing when to ask – when not to</li></ul></li><li>3. Direct communication<ul style="list-style-type: none"><li>• From the coach(s)</li><li>• Promoting direct communication among participants</li></ul></li></ol>
<b>Facilitating Learning &amp; Results</b>	<ol style="list-style-type: none"><li>1. Creating Awareness<ul style="list-style-type: none"><li>• Support the group in creating awareness</li></ul></li><li>2. Designing Actions<ul style="list-style-type: none"><li>• Support the group in designing individual and collective actions</li></ul></li><li>3. Planning &amp; Goal Setting<ul style="list-style-type: none"><li>• Support the group in planning and goal setting</li></ul></li><li>4. Managing Progress &amp; Accountability<ul style="list-style-type: none"><li>• Manage time, progress and accountability</li><li>• Support group level accountability</li></ul></li></ol>



## The Interplay of Coaching, Facilitation and Teaching Hats

The coach and facilitator roles overlap in many ways. Effective group coaching needs some facilitation skills. If some aspect or component of teaching will be included in the group experience – the third hat will come into play as well.

### The Overall Coach Role

A successfully coached group session integrates core coaching skills and cornerstones to deepen the learning and forward the action.

The Coach:

- **Sets the foundation** for confidentiality, safety & agreements
- **Takes a stand** for the clients and group as naturally creative resourceful, and whole
- **Uses coaching skills** to support the process of discovering
- **Practices focused & global listening** and monitors the energy of the group
- **Elicits** what the members of the group want
- **Requests action**
- **Uses ‘Coach speak’** where ‘less is more’ and the goal is to get interactive communication within the group
- **Works to establish sustained conversation** within each session to create support between the coaching sessions
- **Works on capacity building** – to help people in the group to be better listeners, better at interacting with each other and exercising empathy

### The Facilitator Role

A successfully facilitated group session should help the group get further, faster and in a more focused way. And hopefully it can be fun too!

#### Facilitation Requires an Adequate Level of Comfort with Being Directive

This includes:

- Creating an environment of mutual trust
- Generate sharing - change to An Ability to generate sharing
- A willingness to listen
- A desire to seek understanding
- An ability to be diverse and flexible
- An ability to challenge yet stay supportive
- An ability to work with people from a wide range of backgrounds
- A toolkit of styles, approaches and techniques
- An ability to stay on task

The difference between being non-directive and being directive is the difference between a coaching group and a support group. The support group does not have a focus on forwarding the movement while deepening the learning. Rather it is concerned primarily with advocacy, comfort and a safe place to be heard and experience community.

## Differences between the Coach & Facilitator Roles

Facilitation is more directive. It is more necessary when the group is forming and going through the initial stages of development. The major differences lie in the degree of direction provided – more in facilitation – less in coaching. In Group coaching we want to have a balance between exploration and structure.

“...you will be required to direct the flow of the group, elicit the theme for the group activities and also plan and lead them.” **Jennifer Britton**

## The 4 Stages of Facilitation

1. Preparation
  - Establishing an agenda
  - Preparing questions
  - Gathering background information about the issues facing the group
2. Introduce the Group
  - Introductions, present and clarify ground rules, ask for commitments and review agenda
3. Management of Group Interaction
  - Pose questions, note responses and identify issues
  - Ensure all participants have an opportunity to speak
  - Identify action plans, and evaluate (evaluation of individual progress and evaluation of the group process)
4. Conclude Each Session
  - Focus the group on follow-up and responsibilities
  - Identify any issues to be carried forward to future sessions

## The Teacher Role

You may integrate your expertise (wearing a SME hat) by adding formal or informal learning segments into the group process or you may have a co-facilitator SME who provides formal or informal learning segments.

## Rule of Thumb for Teaching Segments

- **Structured Learning Segments:** It's important that the teaching segments be brief and clear, as a rule keep to 5 to 7 minutes, in 'theory bursts'.
- **Informal/Impromptu Learning Opportunities:** Obtain the group's permission to teach when the opportunity occurs and keep to short 'theory bursts'.
- **Following Teaching Segments:** Allow the group to return to processing or discussion time afterwards. You want to make sure that there is time before the end of the group for any questions, discussion and for the coach to conclude the group.

## The Wellness Group Coach in Action

As in individual coaching, the group coach balances an active interplay of coaching skills, practical time management and the uniqueness that you bring to the table. Unlike individual coaching, your 'client' is the group as well as the individual participants. As coach it is your responsibility to:

### Establish the Coaching Alliance/Create a 'Container' for the Group

- Clarify and establish the ground rules
- Request and obtain agreements for ground rules, safety and confidentiality from all members
- Identify any additional agreements the group members request and obtain consensus and agreement from the group
- Identify and address concerns
- Create a *safe space* where it is safe enough to feel unsafe

### Be Aware of the Group Agenda – At Every Level

- **The Group's Big Agenda** is the high level overall agenda. The Big Agenda is related to the overall focus or intention of the group. If there is a difference between the group leader's concept of the Big Agenda and the group's concept of it – there will be a problem – as if 2 different groups are happening at once.
- **Each Member's Big Well Life agenda**. This should dovetails with the group's Big Agenda.
- **The Little Agendas or goals – in service of the Big Agenda**
  - The Group has specific collective goals. At a minimum these include accountability to the group, commitments to keep agreements and to take action. There may be other collective goals defined by the group.
  - Participants may have shared common goals.
  - Participants may have their own individual goals.

### Promote Being Fully Present & Participation

- **When the session begins use a structure** or process to bring everyone's attention and focus into the group.
- **Use of 'Clearing'** or providing a structured amount of time (1-2 minutes) to simply vent may be helpful when a group member is having difficulty shifting their focus away from an interaction or event that happened outside the group, or just preoccupation with work or family concerns.
- Reach out to participants who do not actively participate.

## Create Opportunity for Discovery/Promote Curiosity and Exploration

Listen for the energy of the individuals and the group as a whole. Energy can feel ‘palpable’ or ‘empty’. Palpable energy can feel heavy and tense (as described by the expression “you could have cut the air with a knife”) or light and airy (like popcorn popping). The energy is a good indicator of attention and focus, how comfortable or uncomfortable participants are, unspoken ‘elephants in the room’ not being addressed, and feelings shared within the group. Feelings may be grouped into four general categories: glad, mad, sad and scared. Each one has its own spectrum and range. For example, “mad” may range from somewhat annoyed, to frustrated, to angry, to furious.

When the energy feels ‘empty’ and it’s hard to ‘get a read’ and it’s important to find out where it is. Have participants ‘checked out?’ Have they lost their engagement in the group? Is there something that is not being said or addressed?

Humor too has its own energy. It is a key component of the mood or atmosphere that surrounds all the participants interacting with each other. Participants sometimes either consciously or unconsciously make statements through humor about themselves, their relationships, the group, and their fears, which they otherwise find difficult to say. Humor can serve one of five essential purposes:

1. **Self -Protection** as evidenced by self-deprecating humor where we make fun of ourselves before someone else can. Humor can also be used in this sense to attempt to minimize a health challenge. This may particularly be noticed in the denial stage of grief (as defined by Kubler-Ross.)
2. **Defense or Attack** strategy evidenced by such things as sarcasm, ‘put-down’ humor, racist, sexist or otherwise inappropriately critical jokes (e.g., humor with a homophobic, xenophobic focus). This may be noticed in particular when someone is especially fearful or may need to be assessed for appropriateness in the group.
3. **Create Connectedness** when we share laughter from a shared perspective that everyone can relate to.
4. **Draw attention to oneself** and away from someone else who may be sharing.
5. **Create a smokescreen** like a red herring that diverts the group away from the real issue. The group ‘gets lost’ in the entertainment of the humor. This is similar to self-protection but tends to dilute overall focus and has a more seductive flavor. It’s harder to veer away from this smokescreen.

Izzy Gesell speaks to the energy and uses of humor described above in his article: *The Elephant in the Room is Laughing: An Expert Facilitator Looks at Humor’s Impact on Group Process* from “Whole Person Associates, Inc” [books@wholeperson.com](http://books@wholeperson.com), Subject: *The Whole Person Gazette, Vol 2, Issue 9*.

Also see his website: <http://www.izzyg.com>

Focused listening is directed at the individual participants. Global listening is

directed at the collective group and more than that. It is directed at the space (inside and outside, or virtual), the overall energy, what your senses tell you and your intuition tells you.

Listening	Your Attention/Awareness	To What
<b>Focused Listening</b>	Attention is on the participant speaking	Content – emotion – expression & energy of the individual
	Awareness is on the group response	Content – emotion – expression & energy of the group
<b>Global Listening</b>	Awareness of everything you can observe with your senses –in & out of the physical or virtual environment	‘Reading the crowd’ What can the Coach draw on from the “all around”  What can or do participants draw on from their “all around” (they may not even be aware of what they are drawing on)
	Awareness of the ‘energy field’ of the group	Use your Intuition Notice what attracts energetically  Notice what repels energetically  Notice where there is lightness/more darkness

### Use Active Listening

Ask Powerful Questions

Use the ‘*Less is More*’ rule

*Allow the group members to take on more of an active role*

Question Directed to	Impact
An individual group member usually when laser coaching	What helps one is often helpful to many
To the Group as a Whole	To highlight a theme or common experience <i>“What do you notice about what is being shared today”</i>
To the Group as a Whole	To promote general discovery <i>“What’s your take away from today?”</i>

## Use Other Active Listening Skills

Active Listening Skill	Directed To	Impact
<b>Paraphrase/Restatement</b> to state back the essence of what they just said	An Individual  May be during laser coaching	Promote awareness for the individual  What is said to one may apply to others in the group or simply inspire a new perspective
<b>Reflection</b> of a common theme or experience	The Group as a Whole	Highlight a commonality  Promote exploration of shared concerns, challenges, goals, etc.  Promote brain storming within the group; promote support building within the group
<b>Articulation of What's Going on</b> Name the energy you are picking up Name the mood you are picking up Name that there is an elephant in the room	An individuals or the Group as a Whole	Create individual awareness  Create group awareness
<b>Acknowledging</b> Is NOT a compliment about personal attributes but rather an articulation of who they are	An Individuals or the Group as a Whole	When someone is honestly recognized for who they truly are, for being true to their values, for their strength in adversity, for their willingness to persevere, for taking action, for their success – they FEEL seen and valued.  In fact they are seen and valued!
<b>Reflection of Feeling</b>  Notice if a group participant is a “spokesman” for a feeling that is shared by many or all in the group	An Individuals or the Group as a Whole	Promote awareness for the individual and/or the group  Promote empathy within the group - leads to group cohesion & formation  What is said to one may apply to others in the group

Active Listening Skill	Directed To	Impact
<b>Silence</b>	All participants	Create space for awareness, feeling, thought  Allow absorption of a new awareness
<b>Intuition</b>	An Individual and/or the group as a Whole	Promote discovery Offer a different perspective
<b>Bottom Lining</b> Often called “Laser speak” or “Headlining”	An Individual	Forces the individual to focus on what’s key  Models for the group  Saves time and helps to keep the group focused
<b>Respectful Interrupting</b>	An Individuals or the group	Return from a tangent – get back on focus  Interrupt an interaction that is inappropriate or undesirable for the group

### Identify Goals, Action Steps & Tracking

Group members may come into the group with a specific goal or several goals; or they may identify their goal(s) through the group process. The goals may be shared goals across all participants or unique to the individual. Group members may come into the group with identified action steps in service of that goal or they may determine what they are while in the group.

- If the client has identified goals or actions steps that they want to implement, work with them to step back and assess the full picture utilizing the 360 °Wellness Mapping Plan model. Make sure that they have defined area(s) of focus that their goals relate to and action steps that flow from their goals. Help them to assess readiness for each area of focus and to evaluate how SMART (Specific, Measurable, Achievable, Relevant and Time Based) their goals and actions steps are. For those who identify their area of focus, goals and action steps as a part of the group process work with them to step forward into the 360 °Wellness Mapping Plan model.
- Request action – each participant commits to one or more actions steps at the end of each session.
- Identify how participants will track their action steps. This may be identified in the group and/or as a part of ‘homework’.

### Establish Accountability through Agreement & Follow-Up

Reporting action taken and committing to the next action steps is critical to accountability, forwarding the action and the ultimate success of the participants. This must be built into the group structure.

**EXAMPLE:**

- Begin the group with a check-in and report of action taken since the last group session
- End the group with an agreement/commitment from each member for what action step(s) they will take

## **Build in Support for In-Between Sessions and After the Group**

How can the group help its members to build a support network beyond the coach and beyond the group – for when the group ends? How can the group members support one another outside the group?

## **Manage Process & Time**

### **1. Maintain the agreed upon group structure consistently**

This supports three essentials for group process:

- It provides validity that the group is doing what you said it would do.
- It establishes reliability from one session to the next that the participants can anticipate and prepare for.
- It provides a framework of consistency (a ‘container’) that participants can rely upon as they work to create and establish new behaviors in their lives outside the group. This does not mean that you cannot have any variety. You can build variety into the group structure.

### **2. Manage story telling/know when to intrude**

The group coach is responsible to contain ‘story telling’ to what is relevant and in the overall interest of the group. Often people are used to telling the ‘whole story’ in exquisite detail. The group tends to get caught up in the story if it’s very entertaining or ‘gripping’. On the other hand the group will become disengaged, distracted and fidgety if it is boring or difficult to follow. One way or another, it is a time drain and can blur the focus.

### **3. Include both group etiquette and story-telling management in the initial group agreements**

Examples:

- In the interest of time and staying on focus we want to keep check-in brief and to the point. Will everyone agree to that?
- May I interrupt you to explore what is important in a story or request that you ‘bottom line’ it for the group? Will everyone agree to that?

### **4. Explore what is important about the story to assist the client in identifying the salient and relevant aspects of the story**

Example:

- I hear that this experience was quite difficult; what was the impact it had on completing your actions step?

### **5. Request the client to ‘bottom line’ is a more direct way to help the client cut through the story to the salient points**

Examples:

- I hear that there is quite a story about this; what is the bottom line for you?
- In the interest of time, bottom line this for us.



**6. Keep track of time to ensure that all participants have an opportunity to share and that the structure or plan for the session is covered and that the group begins and ends on time.**

- Group participants, although not responsible for watching the clock should also be educated to be aware of time. This is both coach and facilitator role.

## **Self-Management**

In order to be effective as a coach and to hold the group's agenda, the coach cannot get in the group's way from achieving its agenda. Self-management is about being able to set aside personal opinions, preferences, defensiveness, judgments, and ego. Not always an easy task! The Coach needs to be 'over there' with the client (the group) – not 'over here' with "how do I look" and "how am I doing". In fact, you as coach need to give up looking good and being right. Your focus is on impact for the sake of each participant and for the sake of the group as a whole.

- 1. Move Forward/Create Learning** – as coach it is important to keep two questions in the back of your mind: "What will forward the action?" and "What will deepen the learning?"
- 2. Ask Permission** – to interrupt, making a request for action, share your idea or intuition.
- 3. Be Aware of Personal Responses** – sometimes a judgment just pops up about a person or a situation. We are all human and may experience an inner response to something someone says or does. Listen to yourself – notice your thoughts, feelings and any knee-jerk reactions. It is very important for the coach to be able to notice when this happens and acknowledge it for what it is. Notice if it is your gremlin voice!
- 4. When to Name It**
  - If there is an environmental distraction. You may need to literally explore it and then move on. Sometimes you can bring the interrupting sound or distraction into the group process. (e.g., name the thunderbolt that just occurred to underscore a point!)
  - If you catch yourself being distracted by something personal and it is interfering with your attention to the group, it is OK to state that you were momentarily distracted and then redirect your attention. If necessary, address the distraction (e.g., a bio break). ***If you don't name it you run the risk of having an 'elephant in the room'!***
- 5. When to Get Help**

If you find yourself having a judgment or a trigger that you cannot shake, as a coach you have an ethical responsibility to explore it outside of the group. A mentor or coach can be of great help with this. The bottom line is that you cannot hold the client naturally, creative resourceful and whole if judgment is in the way; and you cannot be effective as a coach if a personal trigger is being fired.

## Be Authentic

Bring yourself fully and genuinely into the group so that participants can feel the integrity of who you are. When participants experience you as real and solid you become like an anchor for the group. When you bring in your authentic self and not a role of “professional coach” or your SME hat, you create more relationship and trust. When you show up in your humanness, you invite theirs. You create an opening for everyone to show their authentic selves and to ‘swing out’ and take risks. This collectively builds the integrity, trust and growth of the group.

## Homework for Chapter One

1. Notice what role are you most comfortable with (Coach/Facilitator/Teacher)?
2. Write down what you are comfortable with and not comfortable with in the Facilitator role and the Teacher role.
3. Take the Coaching Skills Self- Assessment (in the Appendix A). Identify where the challenge(s) will be for you? What skill do you want to work on?
4. Watch a short uTube by David Rock – the creator of the SCARF mode:  
<https://www.youtube.com/watch?v=isiSOeMVJQk>

## Optional Exercises:

1. Practice Intruding  
Get together with a friend or your class buddy and let this person know that you are going to practice the skill of intruding and you are going to interrupt as he or she talks. Have your friend or your class buddy tell a story from a significant period of their life that can be stretched, since it’s important that the story go on and on. Your job is to intrude and change the course of the storytelling.

### Interruption tactics:

- Ask your ‘client’ to summarize: “What did that mean to you?”
- Interrupt with a powerful question (not for more information): What did you learn from that? OR what about that is important for you?
- Interrupt by paraphrasing what is going on in the story at that moment.
- Interrupt by requesting to interrupt and then asking a question.
- Interrupt by announcing that you are going to interrupt: “I’m going to interrupt here”
- Other language for interrupting: “excuse me, you just.... – Let me ask....”
- Interrupt by summarizing what the client just said and follow the summary with a question that points them towards a new focus
- Be creative – swing out – experiment!

At the end share with your partner what it was like to listen at this level

and what it was like to be listened to at this level

2. Practice Listening (about 5-15 minutes for each segment):

- **Internal listening** - Listening from your own perspective  
Ask someone to describe a trip or share a story where things did not go so well. As your partner talks, your job is to listen to the words and interpret them in terms of your own experience. Share your opinions, your similar experiences, or how your experience was different. At the end share with your partner what it was like to listen at this level and what it was like to be listened to at this level.
- **Active Listening**  
Work with the same partner – but this time, be curious. Ask questions for the client's sake, paraphrase, and use other active listening skills. At the end share with your partner what it was like to listen at this level and what it was like to be listened to at this level – notice what felt different to you between internal and active listening.
- **Global Listening**  
Take yourself to a place or event where there is a great deal of activity – for example a library, hotel or other lobby, fast food restaurant. Notice the overall buzz – energy – mood. Are there individuals who are feeling angry – happy – other? How did people around them respond or react? What was your response? Notice if there are shifts in energy. What are they? Now Close your eyes and listen more. At the end jot down what the experience was like – what was comfortable or not comfortable for you - notice what felt different to you between having your eyes open and closed.
- **Group Listening**  
Ask a few (3-4) friends to work with you. Tell them you are going to identify shared themes or experiences or feelings. Ask your friends to share an experience they all have had in some way – for example a trip, a job interview, an embarrassing moment.

State where you hear two or more of your friends having a shared experience (could be a literal or metaphoric experience). State where you hear 2 of your friends sharing the same feeling. Notice what happens when you state the similarities.

At the end share with your friends what it was like to listen at this level and ask what it was like to be listened to this way.

## Resources

- *Facilitative Coaching*, Swartz and Davidson, Wiley 2010
- *The Coaching at Work Toolkit: A Complete Guide to Techniques and Practices*, Zeus, Perry and Suzanne Skiffington, Australia: McGraw Hill, 2003
- *Coach U's Essential Coaching Tools*, Coach U, Inc Wiley 2005



## ***Chapter 2***

# **Group Dynamics & Process**

### **Key Concepts**

- How groups evolve
- Group member stages of transition from an identity of one to being a part of an integrated whole

### **Connections to Be Made for the Group**

- Being able to identify where your group is along the journey from start to end

### **Applications**

- Being comfortable with the process of group evolution

## Group Dynamics and Process

There are certain principles of group dynamics that apply to any situation where human beings come together in groups. A little knowledge about this can help you understand what is going on as your group evolves.

Let's look at two different group dynamics theorists with valuable models for helping us understand how groups come together, grow and eventually end.

### Will Schutz's Group Process Theory

#### INCLUSION — CONTROL — AFFECTION

- **Inclusion Phase**

The first task of any group is to define and create itself. Each group member is working on becoming, and feeling, included in the group. Acceptance/rejection feelings and issues arise. Structure and ground rules help everyone feel included. The group leader facilitates getting the group off the ground little by little, acknowledging everyone. The group works on trust and gaining enough of a feeling of inclusion for most members to feel engaged.

- **Control Phase**

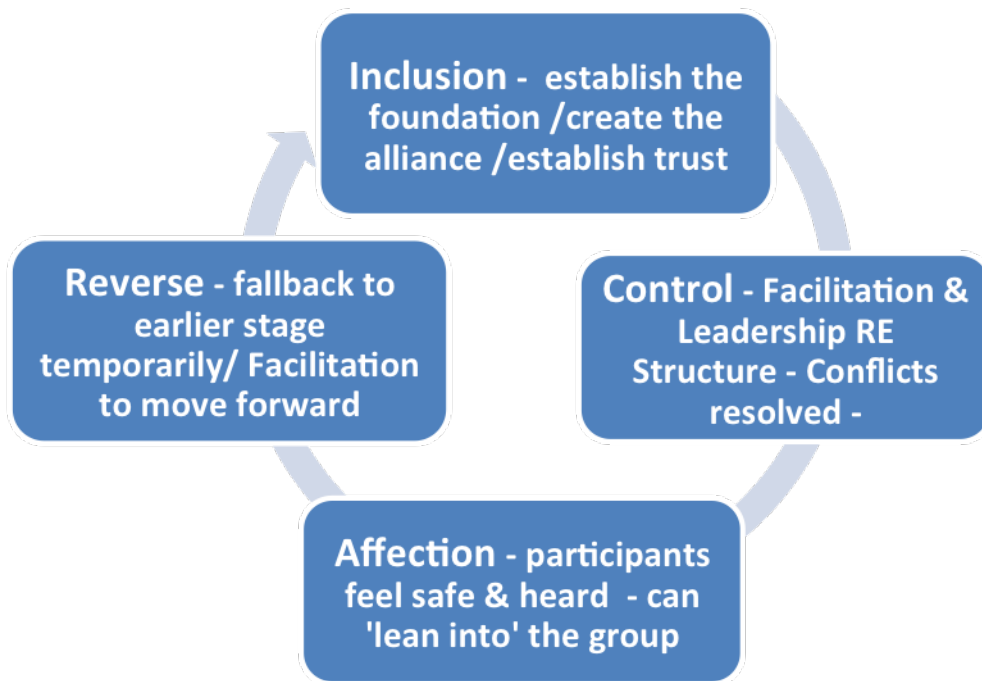
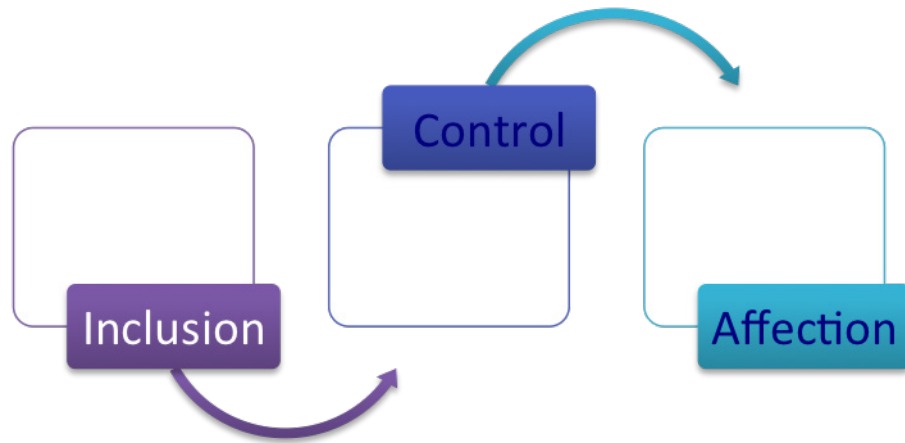
Once a feeling of inclusion is sufficient, the group starts to work on getting clear about how the group will operate, how decisions are made and how much freedom there is versus structure. Leadership issues and conflicts come to the forefront and are worked out. If Control Phase questions are not resolved, the group, or some members of the group, may slip back into the Inclusion/Exclusion Phase and question whether to remain a member or leave it literally or figuratively (physically present but not fully 'present' and participating).

- **Affection Phase**

With Control issues resolved and a high degree of feeling included, the group members can feel free to care about one another and support each other's progress. The work of the group gets done effectively.

- **Reverse**

At any time the group can go back to the previous phase of development and then if conflicts, etc. are resolved, regain its previous phase. As the time for the group to end comes near, groups often experience this reverse direction of phases as well. This may be characterized by more conflict about leadership and control, and possible distancing of emotional connections as members prepare to part company with each other.



## Tuckman's Stages of Group Process

### FORMING –STORMING- NORMING-PERFORMING- ADJOURNING

#### 1. Forming

In the beginning, the group comes together and moves from not knowing each other and relating on a somewhat superficial level to feeling a sense of being a part of something greater than themselves and having played a part in creating it.

#### 2. Storming

As the group goes beyond just being polite, it gets down to real issues, conflicts, etc. (Like Schutz's Control Phase)

#### 3. Norming

In this phase trust is developed and group members get more comfortable with each other. The group starts to become productive.

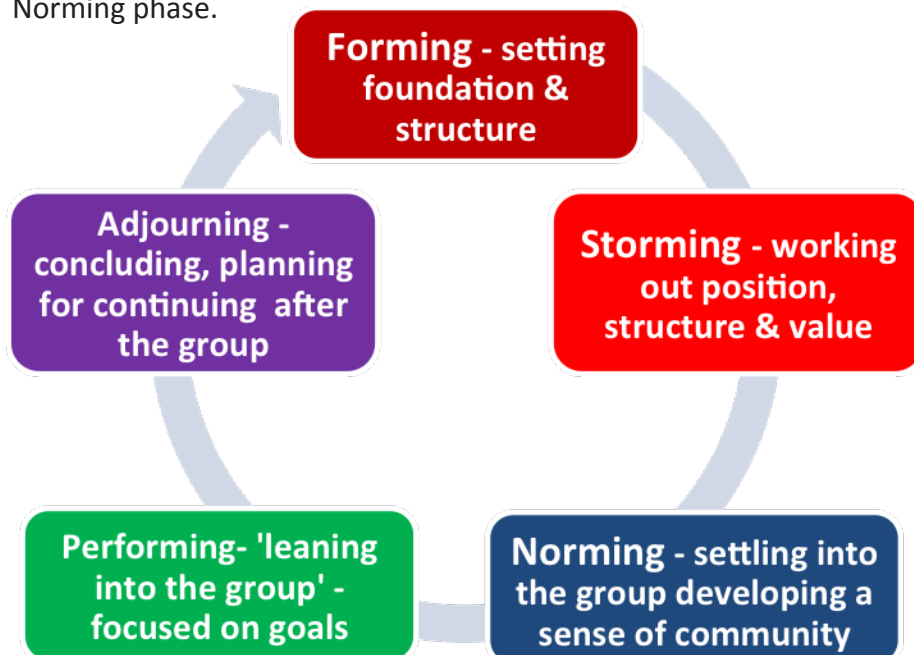
#### 4. Performing

Now the group works together cooperatively in an efficient manner. The focus becomes clear and the purpose of the group is realized.

#### 5. Adjourning

At the end of the group, members begin to experience mourning and the loss of connection. The focus is on saying good-bye and 'what's next'.

Tuckman acknowledges that while groups work this way overall, the individuals within may not all follow this developmental pathway in the same or at the same time. The group as a whole however needs to complete one phase before it can move on to the next. If, for example, there is insufficient trust, the group may never get to the Norming phase.





## In the End

- Each group moves through its own stages in its own time.
- Not all groups will move in an exact linear fashion.
- Short groups (less than 8-12 sessions) may not get beyond forming- but nevertheless do have a beginning, middle and an end.
- Each stage has its own characteristics and the coach must be in touch with the needs of the participants' safety, conflict, bonding and connection.

## The Benefits of Knowing What Stage Your Group Is In

All wellness coaching groups have an identified purpose or intention that becomes the stated focus of the group. However, when people come together in a group there is another often unstated but equally important intention or purpose – that is developing relationship/connection to one another. That connection becomes the foundation and the essence of the **Group** component in the **Relationship Empowerment Triangle**. Without that key component the group will not have the efficacy and power we want it to have. Indeed it will be a collection of people rather than a cohesive whole.

Group process essentially models the way we as humans beings come together and form relationships. It is a natural and organic process. It can get 'stopped' or blocked for the same kinds of reasons we experience a break with relationships in our lives. Breaks can also be addressed and reversed resulting in the deepening of relationships, in the same that can happen in our lives. The group leader is not only responsible for facilitating the group through its primary stated agenda or purpose; the leader is also responsible for facilitating the process of building connection within the group.

Knowing at what phase the group is in at any point in time is extremely important for the group leader(s) so that they can:

1. Support the group where it is right now – meet the (client) group where it's at. Trying to work with the group as if it were in another phase will create confusion and potentially tension among group members.
2. Facilitate movement through the different phases. Each phase is a critical piece of a building process. A solid foundation is built during the initial phases where group members can establish trust and a clear understanding of how the group works – not just because the group leader describes or identifies the ground rules and structure – but because the members actually experience that the group is running the way it has been described to run. Now they can truly 'lean into' the group knowing the container is solid. When group members can trust one another and the structure they can focus on the work of the group without the distraction of feeling insecure or wondering if they can take a risk.

3. Facilitate the 'jelling', that unspoken but nevertheless significant aspect of the work of the group to 'jell' together – to create connection during the group, in-between it and when it ends. For some this connectivity may be the only place where they experience it at all. That is to say, family, friends, co-workers may not provide the kind of connection and support for whatever the group member is going through, that the group can provide.
4. Identify and help individuals who are not at the same phase as the rest of the group. One member out of sync can divert the group from its primary focus and work. One member having trouble moving into the current phase of the group can feel lost and alone.
5. Identify an individual who is not appropriate for the group. Hopefully this can be done even before the group begins, but it is not always possible. If a group member cannot move into trust or beyond control issues, it may be more appropriate to refer them to another service.
6. Understand when to keep an open eye for reversal or if unanticipated, identify that the group is in a reversal process. The leader can then facilitate the group through the reversal and back to the prior phase. Groups will move into reversal for reasons that are important to the group. Reversal is not just a negative and undesired phase. Being able to process those reasons for reversal is critical to the group's effective functioning and ability to move forward. The way out of reversal is through it!
7. Treat movement through the different group phases as a normal and critical element of the group experience and honor it. This can both model and support exploration and transition from one phase to another for the group members.
8. Be prepared for reversal at the end of a group and facilitate it through grief and closure and identifying what the individual members need in this phase to complete and be able move forward in the best way possible. ***People come into the group as an individual, they leave it as a member of a group whose energy and impact continues on in each one.***

## Homework for Chapter 2

### Reviewing Your Experience

1. Identify what experiences have you had in group process as a leader or a participant? If you have not had specific experience in group process – broaden your criteria to being on a team (sports, work), in a class or course of study.
2. What stages of group process have you experienced (from what you identified in question 1)? What worked and what did not in the stage(s) you experienced? What was the learning that you can use?

### Understanding Yourself

3. What stage(s) would be challenging for you as a group coach? What can you draw upon from your experience?
4. Identify the role(s) you normally take in a group.
5. How do you include and exclude yourself in groups?

### Resources

*The Magic of Conflict, Thomas F. Crum, Touchstone 1987*



## ***Chapter 3***

# **Designing the Foundation of the Group**

## **Defining Vision, Focus & Your Audience**

### **Key Concepts**

- The Importance of vision & values
- Third party & independent coach considerations
- ‘Know Your Client’
- Using creative tools

### **Connections to Be Made for the Group**

- Establishing the foundation by defining vision and focus
- Integrating third party or independent coach concerns and interests

### **Applications**

- Creating your coaching vision and your group vision
- Defining your audience
- Using brainstorming tools

## The Design Begins with You

In his Book *Seven Habits of Highly Effective People*, Stephen Covey's second principle is to "begin with the end in mind®". The idea is to apply self-leadership in service of the desired outcome; to stay focused on the end result. It's about 'keeping your eye on the ball' – so that it ends where it is intended.

To 'begin with the end in mind' requires knowing what the 'end' is – what you want to create. The best design for your group coaching experience begins with a clear vision. This is a living, breathing picture of your group. Until recently the traditional paradigm around creating a vision could be described as defining a linear path towards a specific end point, as if the vision itself was 'the end'. Have you noticed that the language used to describe a vision is often tedious, uninspiring and filled with vague and boring generalizations, perhaps best left on a page in a drawer? The very idea of having to create your vision has up to now often been totally unappealing.

There is however, a new paradigm for what a vision is and does! This new paradigm describes 'vision' as an energy field, something that is palpable, felt not seen. As energy, it is something that permeates everything in your coaching. And everyone who comes in contact with your vision field is influenced by it. Now creating your vision becomes compelling – rather than repelling.

"When a strong vision is in place...it permeates and infuses the ....[coach's] energy and ideas....If you create a field of vision ... it can begin to have an effect on you and your clients immediately." -Lynn Grodzki, *Building Your Ideal Private Practice*

## What Your Vision Energy Field Will Give You

- It makes your design work much clearer, easier and fun!
- It helps sort out what to include and exclude
- It sets the foundation for your goals and action steps in creating your group
- It becomes the motivating force that will help to push forward when you bump up against your own resistance at the border between having an idea of what you want to create and actually making it happen
- It models the process you want for your clients: 'Walking the Walk'
- It sets the stage to maximize your success

## What if the Group is Not Your Design?

You may be leading a group that is wholly or in part defined by the organization you are working for as an employee or contractor. In this case the value of creating your vision has an additional unifying force. It allows you to:

- Align yourself with the goals and 'vision' of the organization

- Set the foundation for establishing your action steps for the group
- Align yourself with the audience that the group will be oriented towards
- Feel “ownership” as leader of the group

## **Create Your Vision Energy Field**

### **Step 1 - Identify Your Unique Strengths and Talents**

- Your vision reflects you at your best. Begin with questions like:
- I am at my best when .....
- I am at my worst when.....
- I am passionate about.....
- I get my energy from.....
- What I believe is special about me as a Wellness Coach is.....
- The special skills, talents and experience I bring to this group are.....
- What I love most about my work is.....

### **Step 2 – Create Your Wellness Coach Vision**

This is about you as a Health & Wellness Coach. What is your own personal vision for your work? Identify what your intention or purpose is for yourself as a Health & Wellness Coach. Begin with questions like:

- What do I want to create or accomplish as a Health & Wellness Coach?
- Who do I want to reach?
- What do I want for them?

### **Step 3 – Create Your Coach Vision for the Group**

- Each group that you run should have its own vision. As with your personal coaching vision it will set the foundation for the goals and action steps for the group.
- Even if you run the same type of group many times, reconnect with your vision each time. It will get clearer and/or shift based on your evolving experience.
- Include the overall results that you want to achieve – for yourself – for the group participants – for the organization, if applicable.

## Examples of Coaches Who Have Created Their Vision

### 1. Coach John

Coach John had a coaching practice that focused on team coaching. He worked in the city of Seattle in an older building in an area that had no windows or open space. Coach John's practice, although once thriving was dwindling. He loved "the work" but felt cramped and uninspired; he felt that he had lost his energy, drive and enthusiasm and couldn't wait to escape to nature on the weekends. He was growing very concerned about his difficulty attracting new clients and maintaining his practice.

When he sat down and did this exercise he realized that he was at his best when he was out in nature; he loved to ski and rock climb, hike and kayak. He was at his worst when he was in closed spaces. He was passionate about adventure, risk, invention and creativity. He could see that his current practice didn't reflect anything that he was passionate about – where his true values were.

John was now 'challenged' to bring adventure and invention into his coaching and restore his own personal integrity to his work. John focused on creating a vision of how he could do just that. He spent time imagining himself working with teams out in nature where they could actually experience trust and cooperation in a new way. He arrived at a point where he could see and feel himself being with groups on an adventure that included team process to get through obstacles and meet challenges together. Six months later he started a new program using a novel approach to develop team skills and effectiveness through weekend group programs in the mountains.

### 2. Coach Susan

Coach Susan wears 2 hats as a nutritionist and coach. She wanted to create a group for diabetic clients that would integrate learning and coaching. She had a clear idea about what she wanted to 'teach' about food and nutrition, but she was concerned that her approach would be too dry and lack interest. She was concerned about the best way to make the topic meaningful, fun and compelling.

When Susan went through Step 1 of this exercise she noted that she did not identify anything that she didn't already know – there was no big 'aha'. However she also realized that she had not been paying attention to what she already knew and had never really looked at the full picture putting "all the ingredients together" (so to speak). Susan loved to be playful; she loved food and all aspects of being with it and all the sensory components of smell, sight, sound touch and taste. Wearing her Nutritionist hat she felt passionate about sharing her knowledge of and joyful experience of being with food. Wearing her Coach hat she felt passionate about empowering her clients and "seeing them take off on their own." Susan was also passionate about helping



people reverse diabetes or minimize its impact and she especially loved being around young adults. She loved their spontaneity and belief that the “world is their oyster.”

Susan saw her challenge as integrating fun with food, learning and self-empowerment for her clients. Like John she spend some time entertaining different mental scenarios about what a group incorporating these ingredients would look and feel like. In informal conversation she asked young adults what about food they found boring or challenging and what would make it fun and interesting. From there she crafted a survey that she emailed to a small population of young adults with type 2 diabetes and followed that up with her own small Focus Group. She took the information she learned from her ‘research’ and applied it to her vision including both the outcomes she envisioned along with those identified by her research audience.

In the end, Susan’s group included young adults with Type 2 Diabetes who were feeling challenged to manage their food with their busy schedules and social lives. The first 3 weeks of the 12 week group were focused on creating vision, identifying habits, challenges and opportunities and creating their individual 360 Wellness Maps or plan. Susan offered brief impromptu learning segments around challenges that her clients shared. The remainder of the 12 weeks included group check-in, identifying challenges and sharing successes and new approaches to managing diabetes. She created a buddy process where each buddy dyad met together outside the group to discover fun, easy and good tasting recipes which they brought into the group. Each group session include a segment where each buddy pair demonstrated an easy and nutritious, diabetes healthy meal or snack that was then enjoyed by the group. Each group ended with the identification of the plan, commitment and accountability for the next week.

## **Orient Your Vision around Your Core Values**

You want to have those principles and values that you hold most dear at the core of your vision for yourself and for your group. Core values are not what you think they *should* be; they are the values that you already stand for; the ones that give your life and work meaning right now. How you show up in the group, your actions and interactions reflect your core values without your thinking about them.

The *Gremlin* or *Saboteur* voice can throw you off especially when you feel challenged in your role as the group leader. Having your core values, which in fact are your personal standards of integrity, readily at hand can be very influential in self-management.

### **1. Identify Your Core Values**

There are many on-line, educational and coaching tools available to

help you identify your core values. One technique is to make a list of 6-12 people who you admire (whether real, fictional, historical, or living now). List next to each individual the qualities that you most admire about them (this may be one to several). Next circle the qualities that you have written most frequently across all the people on your list. Finish with a list of 6-12 qualities that you have circled and that really speak to you. These are your core values – your standards of integrity. You can know that they are because they are the qualities that you recognize over and over in others. If they were not, you would not recognize those qualities above all others in people you admire.

After you have identified your 6-12 core values, identify the top 3. These will be the driving standards for you in your group. Write them down.

See the **Resources** section at the end of this chapter for additional Values Clarification tools.

## 2. Have Your Core Values at Hand

It is especially helpful to keep your list of core values where you can see them at home, at work and on-the-go. Apply the concepts of neuroscience to help lock-in your connection to your core values and creating a habit of connecting with them. This connection can provide inspiration when you feel blocked or help to stay on track when the gremlin voice shows up. You can use this connecting exercise at any time. For your group work, use it to center yourself when you develop your group design and before you begin every group coach session.

## Designing a Group within an Organization

Coaches who are direct employees or contractors of an organization/ third party can think of themselves as co-designers with the organization whether or not the organization stipulates specific structure, model, target population, venue or format for the group.

If we consider the relationship of the organization to the group looking at the “*Group Coaching- Relationship Empowerment Triangle*” (described in Chapter 1), the organization becomes an integral empowerment partner with the coach. The role of organization may be described similarly to that of a TV or film producer. From the first draft, through all stages of production, success or failure rests largely in the hands of the producer. Producers are in charge of ‘selling’ the finished product to its market; and have the last word when it comes to casting questions – in our case, selecting the group leader(s) and identifying the group audience.

The organization as “producer” of the coaching group has a responsibility to take time to evaluate and assess before the actual production can begin. As any other product or service, the coaching group reflects the face of

the organization to the public and the group audience. The organization is responsible for the fiscal bottom line; the ethical, competent and professional delivery of services to its designated market; compliance with regulatory requirements and alignment with its stated mandate or mission. It is **responsible to** its Board of Directors, partners (if any) and sub-contractors, shareholders (if a publicly held organization), its management team and staff, and its consumers and often the community it serves. Concerns that the organization will have in evaluating a Wellness Coaching group include:

- Meeting the current fiscal priorities and goals
- ROI (Return on Investment) - the wellness group may need to pay for itself
- Ensuring that the goals, focus, delivery and design of the group are in alignment with and reflect the integrity, voice and vision of the organization
- Ensuring that there are no liability issues or concerns
- Ensuring that the group offering fills a need in alignment with the mandate or mission of the organization
- Ensuring that the group offering is targeted towards a clearly identified consumer audience with a demonstrated need for the 'service'
- Arriving at a comfort level that the group leaders are qualified with appropriate credentials and expertise; and can be relied upon on to represent the organization with personal and professional integrity and skill
- Arriving at a comfort level that the group leaders are also in alignment with the goals, voice and vision of the organization

### **Considerations for Groups within Organizations**

Different considerations will come into play depending upon whether the organization has an established Wellness Program or supportive insurance program in place. Additional considerations revolve around assessing the merits of a group program as well as practical and logistical business concerns.

### **Considerations When the Organization Has a Wellness Program in Place**

- What are the organization's priorities for health and wellness?
- How are those priorities being addressed/delivered by the Wellness Program?
- Are there established areas of focus (e.g., smoking cessation, stress reduction, weight-loss)?
- Are there any gaps in the Wellness Program offering or opportunities for enhancement?
- How will a wellness group fit into the established overall Wellness Program, its mission and goals?
- Does the Wellness Program have an established group model?

- Is there anything to capitalize on such as a Wellness Program or insurance plan incentives?

### **Considerations Regarding the Merits – Pros & Cons - for a Wellness Group**

- What are the benefits to the organization, the Wellness Program, the community, the public?
- Is this an offering that fills an identified need?
- Is it in alignment with the vision and mission of the organization?
- Can it be delivered in a viable and cost effective format?
- Does it compete with any other programs?
- Could it enhance or supplement another service or program (i.e., a Diabetes group)?

### **Practical Business Considerations**

- Does the identified audience 'have an appetite' for this service?
- Does the identified audience have restrictions or needs that can be met? Is there an associated cost?
- Are there cost concerns regarding when the group can be offered? The overall length of the group or session length?
- Are there facility concerns?
- What is the funding? Some possibilities include:
  - The group is provided for employees, students, patients as a part of an insurance package or wellness program
  - The group is offered as an optional internal service with a fee set by the organization.
  - The group is offered to external patients, clients as a part of an insurance package or wellness program
  - The group is offered to external patients, clients with a fee set by the organization

All these questions may require research, the development of a proposal, resource assessment and cost analysis.

### **Example - Creating a Wellness Group for the Staff in a Rehabilitation Hospital**

Martha and Bill worked for a rehabilitation hospital. They provided discharge planning and coaching services. They recognized that the staff (nurses, aides, therapists) were often very stressed and without resources of their own during the work day. They had heard of another hospital where a coaching program for the staff had had very beneficial results for the staff and had actually resulted in decreased sick time and absenteeism. They proposed creating a wellness group for the staff to their senior management. The response was recognition of the stress that the stretched staff experienced along with dubiousness regarding the impact to patient services and any relevant impact to cost savings or productivity. However they were told that they would consider a proposal that could provide a

concrete basis for cost savings, increased productivity, evidence that the staff would be interested in participating in such a group, and that it would not interfere with regularly scheduled services.

Martha and Bill set out to create the proposal. This meant gathering data to support the cost of stress in their own organization (absenteeism) and evidence of positive results from wellness groups in other organizations. Research included a review of wellness literature and discussion with colleagues from the hospital that had had a successful staff wellness group. Initial Informal discussion with the staff revealed interest from about 60% of staff. Martha and Bill followed that up with a questionnaire to identify the impacts of stress on staff (e.g., sleep disruption, absence due to illness, physical symptoms and increased illness such as IBS, skin disorders, allergies, significant weight gain, low energy) which they could tie to aggregate absenteeism and its impact on productivity. The most difficult part was identifying when a group could be conducted without disruption to services, required staff breaks or the employee work schedule. This took significant research and discussion with staff and management.

Finally Martha and Bill could put together a proposal for a plan that would not cost the company anything and could potentially facilitate a happier, less stressed staff with cost savings – real or potential.

## **Designing a Group as an Independent Coach**

As an independent coach you may have more flexibility and options available to you in terms of the design and audience. However you must also wear the hat of ‘producer’. You may choose to be an independent producer or to identify a ‘co-producer’. Your co-producer may be an organization such as a YMCA, non-profit support organization, or a health care provider who has an interest in being a SME or expanding their services. Your co-producer may also be an organization that you worked with in the past with an identified gap in delivery services.

As producer or co-producer you must now consider some of the same things that the big organization assesses.

### **Begin with Yourself**

- What aligns with your vision and values?
- What’s interesting to you? What are you passionate about?
- Do you have a mission for your coaching practice?
- Where do you already have personal experience, and/or background/training and interest? Where are you comfortable?

## **Identify Where There Is a Need**

- Look at trends in your area of interest. Is there a current area of focus or theme that has momentum or popularity?
- Are there gaps that you could fill?

## **Identify Your Target Audience**

Gather information about your prospective audience to determine whether:

- It is a viable choice
- It can meet your pricing and format requirements
- You can effectively reach it - market yourself

This topic is discussed further in the section **Identify Your Audience** below

## **Identify Your Time, Geographical and Financial Requirements**

- What amount of time can you devote to planning and to group delivery?
- What is your geographical range?
- Are you willing to create a virtual group?
- What are your base-line expenses and baseline financial requirements?

## **Identify the Value & Benefits of the Group to Your Target Audience**

- What will it give them?
- What can people expect to take-away from the group?

## **Identify Whether You Want a Co-Lead or ‘Co-Producer’**

- What are the pros and cons to conducting it on your own?
- What are the pros and cons to co-leading?
- What are the pros and cons for co-producing the group with a small organization or medical provider?
- Who are potential individuals, SMEs or organizations you would like to investigate?
- Research who they are and what they are about - Have an exploratory discussion

## **Identify the Group’s Focus**

Whether designing a group as an independent coach or within an organization it is important to be very clear on the focus and scope of the group. All groups must have an orientation towards wellness. Will the focus of the group be specifically around wellness? Will it include one specific wellness focus or a multi wellness focus? Will it be oriented towards a specific health challenge or an ‘at risk’ audience?

## Identify a Wellness Focus

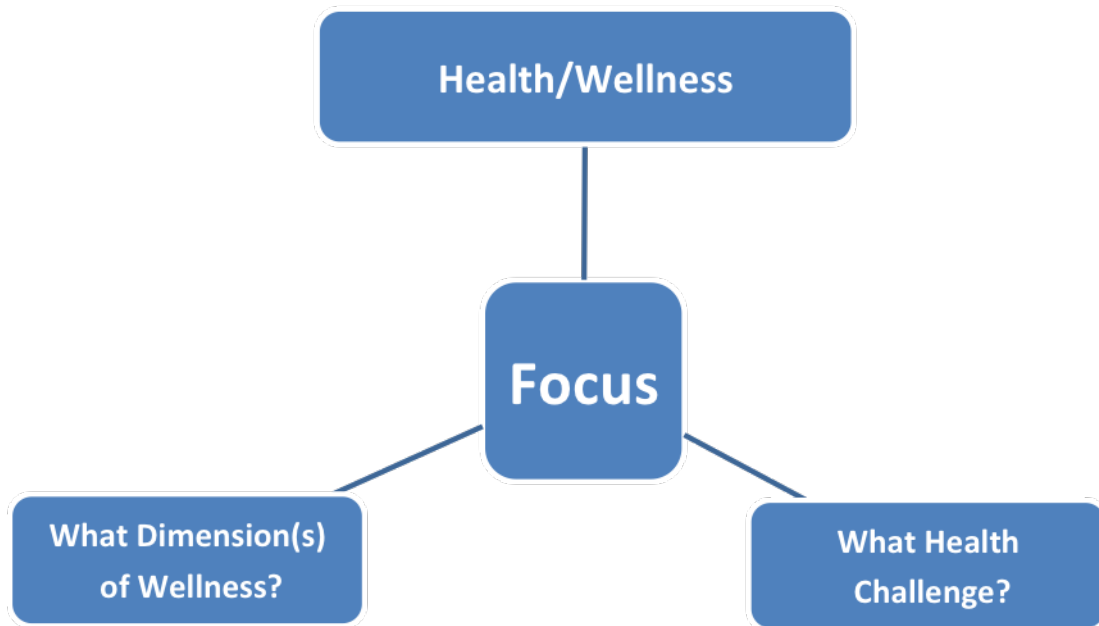
Groups may have a single, general or exploratory wellness focus. They can all be of significant value; however you will want to evaluate which will be most effective for any given audience.

### A Single or Specific Wellness Focus

The group purpose is to support the participants in achieving a specific wellness goal.

Examples:

- Weight Loss – Changing eating habits
- Fitness/Movement – Changing patterns and habits of movement
- Stress Reduction – Changing how to recognize and address stress
- Aging Well – Changing behaviors around special concerns
- Life Balance - Changing behaviors around special concerns



### **A General Wellness Focus**

The group purpose is to support the participants in achieving different wellness goals. In *General Wellness Coaching* groups each member is likely to be working on a different wellness goal. The participants may have had individual coaching and/or already have identified goals and action steps and want support to begin or maintain their new program. Or the participants may be struggling with identifying or maintaining goals and actions plans on their own.

### **An Exploratory Wellness Focus**

The group purpose is to introduce participants to wellness and to facilitate identification of a specific area of focus for future work. The Group may:

- Explore an assortment of wellness dimensions (pre-defined or selected by the group)
- Focus on one dimension of wellness and explore how it impacts other dimensions of wellness. (e.g., explore the impact of breath on stress, movement, eating, etc.)
- Explore a specific theme or combination of themes such as well life vision, values, stage of readiness or identification of a wellness focus.
- Other

### **Identify a Health Challenge Focus**

The group may be targeted to a very specific audience with a similar diagnosis or health challenge and/or at a specific stage of adaptation of a health challenge.

### **A Specific Health Challenge Focus**

All participants have a similar medical diagnosis. The group's purpose is to support participants in achieving their identified goal(s) or a common goal. Some health challenges may include:

- Heart Disease
- Diabetes
- Cancer
- Arthritis

### **A Sub-Group with a Health Challenge Focus**

All participants have the same specific medical diagnosis. The group's purpose is to support participants in achieving their identified goal(s) or common goal. Some health challenges may include:

- A specific type of cancer (e.g. breast, colon)
- Specific area of heart disease (heart attack, high blood pressure)
- Pre-diabetes
- Diagnosed Diabetes (Type 1 or 2)



## A Specific Stage of the Health Challenge

### Onset Focus

The group's purpose is to support participants through the initial experience, dealing with what is now required, what must change, self-advocacy and support.

- Early diagnosis
- Onset following a crisis (e.g., heart attack, bypass surgery, cancer surgery)

### Adaptation Focus

A group with a specific focus on one of the 3 "R's" - Recovery, Rehabilitation and Reclaiming. All participants share the experience of being in the same phase of adaptation for the same health challenge.

#### 1. *Recovery*

The group's purpose is to support participants through the initial experience and planning for rehabilitation/recovery.

- May lend itself to a brief inpatient experience prior to discharge
- May not lend itself as well to out-patient group experience

#### 2. *Rehabilitation*

The group's purpose is to support participants around compliance with rehabilitation, reclaiming as fully as possible and prevention. Concerns may include patient's mobility and energy level.

- May lend itself to a virtual group or a group held at a rehabilitation center

#### 3. *Reclaiming*

The group's purpose is to support participants around prevention, reclaiming as much as possible, and thriving while living with a health challenge.

- More opportunities for both in-person and virtual groups

## Identify Your Audience – “Know Your Client”

Billions of advertising dollars are spent on defining market segments or specific groups of people and understanding everything about them including their overall demographics, ethnicity and cultural concerns, what’s important to them, what media (TV, newspapers, and social media) they use and what they want.

Whether you are designing a group for a target audience that you have identified or for an audience that has already been identified by an organization, it is equally important for you as the coach to know your client.

## Why Is This So Important?

Gathering information and going through the process of understanding your audience will:

- Force you to get very specific about your audience
- Ensure that you are in sync with your audience
- Identify and hold the client’s agenda: both the overall group agenda and that of the participant’s individually
- Identify the themes and topics that are most important to this audience.
- Identify where you need to do additional research
- Help you design the group structure (venue, format, length and size) to meet the needs of that audience or to make adjustments to an identified venue and/or structure
- Help you market effectively to the intended audience

## What to Consider

### Inclusion/Exclusion – Who’s In & Who’s Out

- Is this an exclusive (homogenous e.g., women with breast cancer) group or inclusive (e.g. anyone who wants to stop smoking)?
- Are there age parameters?
- Will it be specific to one or both genders?
- Will it target a specific ethnic group?
- Will it target a specific *Stage of Readiness*?
- Other – what other considerations do you have?

### What’s Important to Them

- What are the particular challenges your audience is facing?
- What are the key goals they have?
- What is their availability?
- What is their preference for a group format?
- What is their disposable income?

### What Outcomes Do You Want to Produce

- What are the goals the participants want to achieve?
- What are the subjective measures of satisfaction for the participants?
- What are measurable outcomes that may be used for the participants?
- What are aggregate outcomes for the organization?

## Brain Storming the Group Design

Group coaching can take on a number of forms. Your group will be shaped by factors including your clients, the focus, the organization (if applicable) and the skills, background and experience that you bring with you. Brain storming can be used for any aspect of group design including the focus, audience, venue, overall structure and how the group sessions are designed. Brainstorming calls into play both right brain & left brain processes and naturally summons what you uniquely bring to the table.

### Begin with the Creative Process

Begin your brainstorming by allowing yourself to think out of the box.

- Allow yourself to do free brainstorming
- Don't censor
- Don't Limit
- Think outrageously
- Continue until nothing else comes up
- Don't reject anything in the first phase. In the next phase when editing ask yourself "What doesn't work?"
- Use brainstorming tools that work for you
- Get it down on paper (literally or on-line)
- 

### Tools to Use

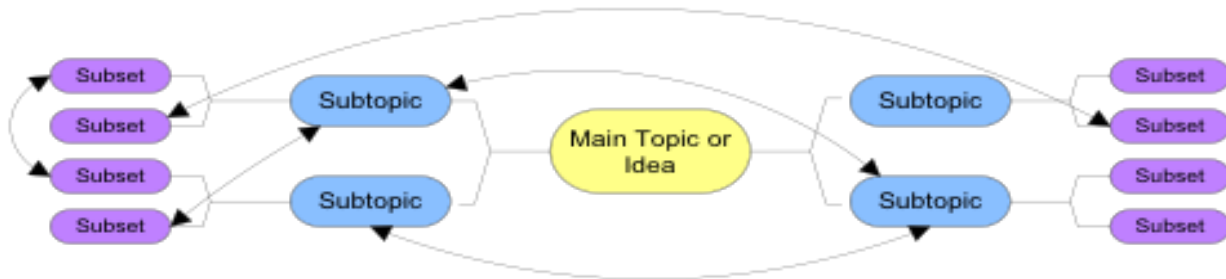
There are three popular brainstorming tools used effectively by individuals, groups and teams in both the private and non-profit sectors.

- Mind maps
- Index Cards
- Sticky Notes

### Mindmapping

Mind Mapping was first popularized by Tony Buzan, a British psychologist & BBC personality. A mind map is a diagram you create to organize your thoughts. You begin with a central idea or focus. Other thoughts or key points are arranged radially around it. It allows you to visually outline your uncensored thoughts.

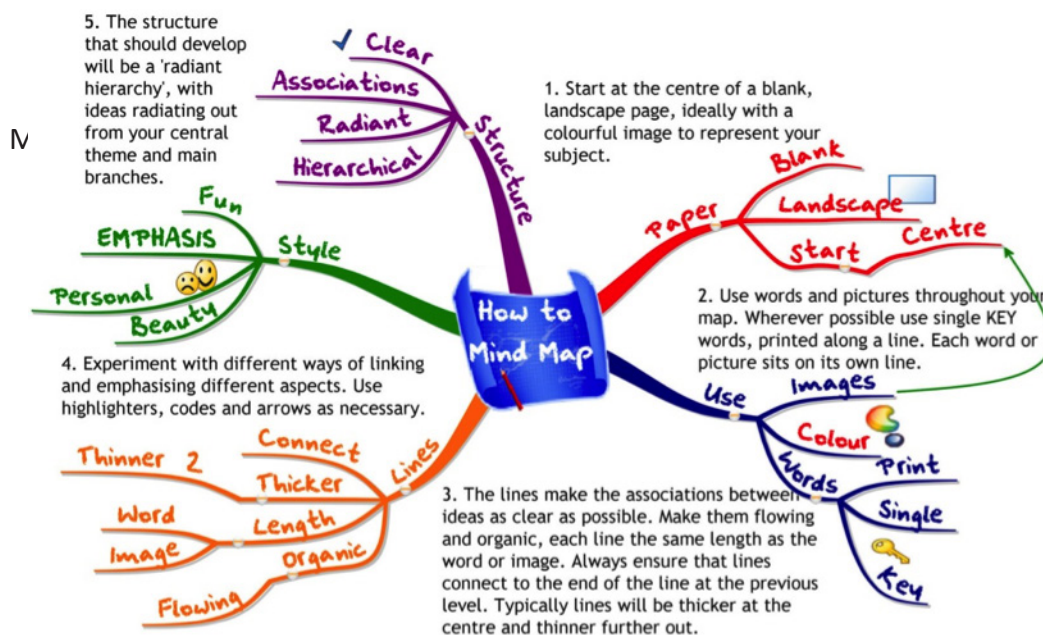
Mindmaps are actually more compatible with the way the brain functions than using a linear structure (e.g., a list or sentence structure). The design resembles the brain's neurological structure and works in the same way that our brains process information. One idea may be interconnected to many other ideas as neurons are. Consider that one neuron in the brain may have thousands of interneural links and pathways. Links in your mind map can be made from any of the subtopics or subsets to another subtopic or subset.

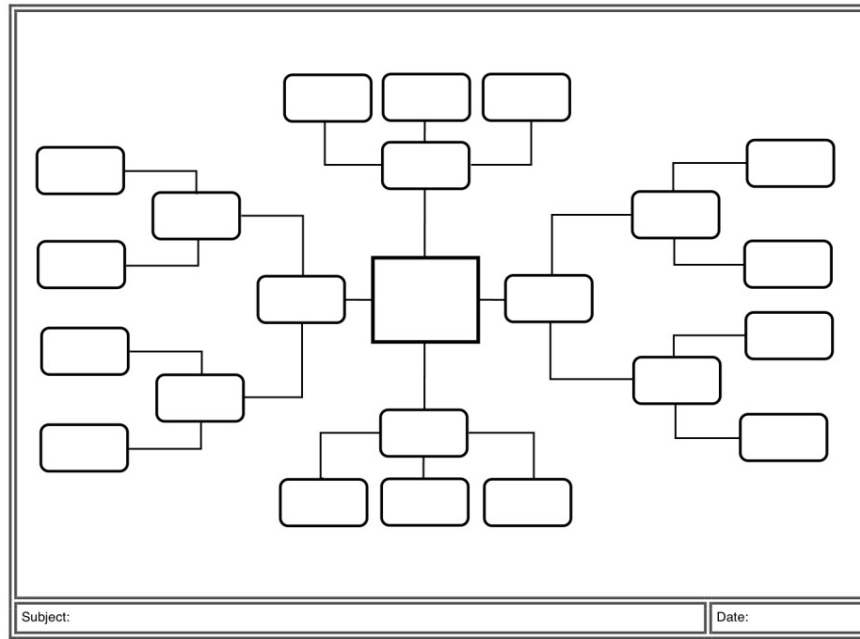


Buzan suggests the following guidelines for creating mind maps:

1. Start in the center with an image of the topic, using at least 3 colors
2. Use images, symbols, codes, and dimensions throughout your mind map
3. Select key words and print using upper or lower case letters
4. Each word/image is best alone and sitting on its own line
5. The lines should be connected, starting from the central image. The central lines are thicker, organic and thinner as they radiate out from the center
6. Make the lines the same length as the word/image they support
7. Use multiple colors throughout the mind map, for visual stimulation and also to encode or group
8. Develop your own personal style of mind mapping
9. Use emphasis and show associations in your mind map

Mind maps can be created by hand:





### File Cards/Sticky Notes

Take your best ideas and write them down on 3x5 cards or sticky notes. You can work with virtual cards/sticky notes on your computer if on-line works best for you. Arrange the cards/notes on a surface or wall or virtual wall. Then move them around until the arrangement makes the most sense to you.



### Some Questions to Help You Get Started with Your Brain Storming

1. What's the wellness and/or health focus?
2. What are delivery options? What will work for the audience?
3. Who's the target audience?
  - What's important to them?
  - What is the Stage of Readiness? How will you assess readiness with the clients?

- What restrictions will they have?
- 4. How will the 360° Mapping Methodology be included?
- 5. Will education be included?
- 6. What will accountability look like?

There are many resources and tools to help you with brain storming. You can find one that suits you or create your own process. You can go high-tech with on-line tools and low-tech using paper and pencil, colored paper and/or colored pencils.

## Homework for Chapter 3

### First Collaborative Session Work - Use your buddy to brainstorm or get feedback for:

Your vision for yourself as a Health & Wellness Coach

AND/OR

Your vision for a wellness group

Include what you did with your buddy in the buddy notes (see Appendix A).

Use a values clarification exercise to define your values for your practice.

### Optional

Create a mind map or card/sticky note map for your group focus

## Additional Resources

- *Creative Visualization*, Gawan, Shakti, San Francisco: New World Library, 1978
- *Soul Purpose: Self-Affirming Rituals, Mediations and Creative Exercise to Revive Your Spirit*. Holder, Jackee , London: Piatkus, 1999
- Personal Style Inventory [Ring-Bound] [HRDQ Development Team](#) , [R. Craig Hogan PhD](#) , [David W. Champagne EdD](#)
- Zero Trends Health as a Serious Economic Strategy, Dee W. Edington, PhD, University of Michigan

## Mindmapping Tools:

**The 5 Best Mind Mapping tools** <http://lifel hacker.com/five-best-mind-mapping-tools-476534555>

<http://www.youtube.com/user/VIAStrengths>

<http://www.viacharacter.org/www/>

[www.mindjet.com](http://www.mindjet.com) - free 21 day trial

[www.Mindmeister.com](http://www.Mindmeister.com) some free access

## *Chapter 4*

# **Designing the Group – Venue & Structure**

### **Key Concepts**

- In person & virtual delivery options
- Benefits & challenges for each option
- Determining the size of your group
- Pricing your group

### **Connections to Be Made for the Group**

- Having a venue and structure that effectively supports your group

### **Applications**

- Deciding on and designing the venue and structure

## Framing the Group Venue & Format

Whether you are going to run a group for an organization or as an independent coach or in collaboration with a co-lead or small organization you **MUST** look at your target audience when determining venue and format or evaluating an existing one. *“Knowing your client”* is a key factor in how the group should be set up and whether it will be successful.

If you are working for or collaboratively with an organization, it is also necessary to think of the organization as a ‘client’ in this context. As the group’s sponsor, its buy-in and satisfaction are just as critical to the success of the group.

If a group is sponsored by an organization there will most likely be some defining parameters and restrictions in terms of format, structure, length and frequency. Restrictions may apply to cost, space (location), availability of space, and hours of operation. Concerns related to the organization’s visibility and/or relationships in the community, marketing strategy, mission, vision and last but not all least, current priorities may also impact the venue and format. Some elements may be non-negotiable and others may be more flexible.

If you are designing a group on your own or in collaboration with another coach, SME or small organization, you need to identify what time, cost and any other restrictions will apply for you, your co-lead and the collaborating organization. Any dates, days, times, cost and availability concerns should be identified up front.

Even if the group has been underway, in order to decide on a venue and structure or assess the current one, you need to know:

1. Who is the audience
2. What are their needs
3. What are their restrictions
4. What are their preferences

There are many possibilities and combinations of format, frequency and length of a group.



## Things to Consider When Determining Venue & Structure

Factor Concern Impacts

Factor	Concern	Impacts
You are working within an organization or collaborating with an organization	What are the sponsor's requirements, limitations & preferences? Cost to the organization? What will the pricing structure be for the group members?	Whether In-Person or Virtual Size Location Length & Frequency
You as Coach	What will you be comfortable with? What are your restrictions getting to the location?	Whether In-Person or Virtual Length of session
	What is your time availability?	Frequency Length of session
	What are your costs?	Whether In-Person or Virtual Size Location Length & Frequency
Your Audience	Where are they geographically? Local? Scattered?  Do they have significant physical restrictions?	Whether In-Person or Virtual
	Price sensitivity?	Whether In-Person or Virtual Size Location Length & Frequency
	What are their personal preferences regarding: Time? Technology savvy/usage?  What are their concerns regarding work and family obligations?	Whether In-Person or Virtual
	What are their restrictions? Physical? Time? Transportation? Other?	Whether In-Person or Virtual, Length of Group Length of Session Location

Factor	Concern	Impacts
Group Process	How long will it take to cover your content and ensure that all participants have an opportunity to participate?	Frequency Session Length Number of Participants
	How important is face-to-face contact to the group focus and content?  Do you want to include activities?  What kind?	Whether In-Person or Virtual
	What is reasonable to obtain successful outcomes?	Frequency Length of Group Length of sessions
	How long will it take to cover your process?	Frequency Length of Group Length of Sessions

## Delivery Options

Delivery options include in-person & virtual/remote possibilities. Both options have advantages and disadvantages for you as the coach, for the clients and for the organization, if applicable.

In-person groups provide an immediate presence for the coach and participants. There is a clear visceral element – one can see, feel, touch, and smell in addition to hear each other. Getting a sense of each other may be easier. The opportunity for interactive exercises is much more apparent.

Virtual groups may require more creative thinking to facilitate interaction and maintain focus. The coach may need to practice more focused attention to facilitate connection in the group and to help participants ‘hear’ with their hearts and guts what cannot be seen.

### Advantages For In Person & Virtual Groups Include:

In Person	Virtual/Remote
More personal – all participants can see each other and the coach	Can reach a broader audience (geographically)
Opportunity for in-group interactive exercises or inclusion of educational component that may require participation	More cost effective No need to secure an appropriate location with an associated cost  Can do interactive exercises with select telephonic technologies
May be preference of participants (ICF Global Survey on Group preferences)	May be preferred by some who find one or more of the following challenging: Transportation Time for travel plus group time Responsibilities at home Physical or medical restrictions
Can focus on the group – not technology issues	Saves time for everyone – no travel time

### Disadvantages for In-Person and Virtual Groups Include:

In Person	Virtual/Remote
Limited geographic participation	Does not lend itself as well to interactive exercises in the group or participative integrated teaching
May rule out potential participants who have time, travel physical or medical challenges.	Need to deal with technology/Potential participants who lack the knowledge or do not have the required equipment  Potentially rules out some or creates an additional cost for them  Need for recording option for those who miss a session
Participants arriving late or leaving early can be more disruptive to the group	Not preferred by many

## Challenges for Virtual Groups

There are some additional challenges that need to be addressed to ensure that the format of the virtual group is effective. These challenges can all be overcome. The issues more often than not relate to lack of experience with the format, a learning curve and willingness to explore and try out techniques and tools that facilitate engagement in a virtual environment. In fact, the virtual setting actually affords a milieu in which participants may be more willing to do things that they might not be willing to do in full view of a group. For example, exercises that invite participants to physically move or gesture freely.

<b>Technology &amp; Logistics</b>	Selecting a reliable media vendor with good support
	Work with participants ahead of time to ensure access/ no technical problems
	Session recording - know how to use it
	Need to educate participants and enforce call etiquette & ground rules specific to the virtual environment
<b>Group Process</b>	Keeping participants engaged and focused
	Establishing & promoting trust
	Creating connection & interaction among participants
	Reaching out to all participants -Track who has spoken and who has not – check-in with participants regularly
	Intervention/comfort with cutting in without seeing the participant(s) to recap, explore, prevent one person from taking over or conflict between participants
	Comfort with silence when unable to see participants
	Using intuition when you cannot “see” the group
	Global listening when you cannot “see” the group
<b>Group Process using a Webinar format</b>	Use of webinar tools to indicate to the facilitator that the participant wants to speak such as ‘Hand Raising’
	Use of a “Chat” feature where participants can write something to the group as a whole.

## Determining/Assessing the Frequency, Length & Time of Day

You will need to take into consideration the focus and intention of the group, and any restrictions and preferences of the target audience.

### Frequency Options

Type	Frequency	Time Limited	Unlimited
In Person & Virtual	Weekly Biweekly Semi-Monthly Monthly	Minimum 4 weeks 3 month 90 day 6 months 1 year	May be ongoing greater than one year – must maintain the coaching process
In Person	$\frac{1}{2}$ day 1-2 days	One time	May be offered in a series with a constant theme or where each session focuses on a different theme
In Person	2-5 day retreats		

### Options for Length of Each Session

Type	Length
In Person & Virtual	60 minutes 90 minutes 120 minutes
In Person	$\frac{1}{2}$ day: 3-4 hours 1-2 days: 6-8 hours/Day
In Person	2-5 day retreats: 6-8 hours/day

### Options for Time of Day – Day of Week

Type	Day	Part of Day
In Person & Virtual	Weekday	Morning Afternoon Evening
In Person  In Person & Virtual	Weekend	$\frac{1}{2}$ day: 3-4 hours 1-2 days: 6-8 hours/Day Morning Afternoon Evening

## **Statistics on Session Length**

The AIR Institute (American Institute for Research) 2008 Group Executive Coaching Survey concluded that:

- 47% held sessions between 1 – 3 hours
- 15% held sessions for 1 day

## **Determining the Number of Participants**

The major difference between teaching a class and coaching a group is the size of the group. A class may be very large or very small. An effective coaching group on the other hand has size limitations.

## **ICF (International Coach Federation) Limitations for the Size of a Coaching Group**

The ICF has determined that 2 is the minimum number and 15 is the maximum number of participants considered acceptable for a group coaching experience. Beyond this range, it is difficult for the coach to ensure that all participants have time to connect with the group and the coach and to ensure an opportunity for the facilitative conditions of coaching. This is an excellent guideline based on ICF coaches' experience. If you are ICF certified and want the group hours to apply towards your coach certification level, you will need to comply with the ICF limitations.

## **Approximate Time for Each Participants**

You want the size of the group to allow at least 5-7 minutes for each participant in the time allotted for each session. Depending on the format, structure and content you will need to assess how much time to make available for individuals to check in, for group sharing around topics and/or to give feedback to each other, for interactive exercises (if applicable), for any laser coaching, for group participants to commit to action steps at the end of the group and for closing the group.

## **Statistics from AIR Institute 2008 Group Executive Coaching Survey**

- 48% of coaches surveyed had groups between 7-12 participants
- The optimal size drops off above 12 participants

## **According to Jennifer Britton**

- There is a trend towards increased group size – to exploit economies of time and cost
- However “Small is Beautiful”
- 4-6 is a great number of participants

## How to Charge for the Group

Pricing may vary depending upon number factors. If the group is sponsored by the organization you may not be involved in that decision or you may be asked to contribute to the price determination. The group may also be related to a Corporate Wellness Program and/or covered by insurance or simply “pro bono.”

Things to consider when determining pricing:

- What is the going rate for like services in the area? Is there an established ‘market rate’ or range?
- Is the audience you are targeting price sensitive? What is their range?
- Where do you want to position group coaching in your practice? How is the organization positioning the coaching group - primary, secondary, loss leader, pro-bono?
- Is there a potential for repeat business or a volume discount?
- Is there a potential for paying individual clients to come out of the group?

## Getting a Ballpark Range on Pricing

### Basic Formula 1

This is an easy ‘getting started’ formula – and one many experienced coaches use.

	Data	Example
1	Your Coaching rate/hour	\$100.00
2	The standard number of people you will have in a group	10
3	Triple the rate and divide by the number of people	$\$100 \times 3 / 10 = \text{\textcolor{red}{\$30 per session per person}}$

### Basic Formula 2

This is a more comprehensive approach

1. Determine the standard number of participants (e.g. 10)
2. Determine length of each session (e.g., 6)
3. Determine the number of sessions
4. Determine the total number of contact hours:
  - Pre-Group call time (e.g., 10 or 15 minutes X number of participants)
  - Group time (minutes X number of sessions)
  - Post group calls - if applicable (minutes X number of participants)
5. Your coaching rate/hour (your rate X number of hours X number of participants)
6. Include your costs
  - Venue
  - Materials, printing, advertising
  - Transportation, etc.
7. Add 3 & 5 and divide by the number of participants
8. Look at the number – where is it in relation to the questions asked above?

**Example:**

Number of participants: 10

Length of Each session – 90 minutes

Number of Sessions: 6

	Data	Example
	Pre Group calls	15 minutes X 10 participants = 150 minutes
	Group Time	90 minutes X 10 participants = 900 minutes
	Post group call time	NA
	Your costs	\$200
	Your Rate	\$100
	Total Hours X Your Price/ hour Plus your costs Divided by Number of participants Divided by number of sessions	1050 minutes = 17.5 hours 17.5 X \$100.00 = \$1750 + \$200 = \$1950/10 participants = \$195/6 sessions = <b>\$32.50 per session</b>

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## Homework for Chapter 4

1. Identify which group venue and structure options are appropriate for your organization (if you work for an organization) or which are viable for you (if you are an independent coach) AND which ones are you most comfortable with/not comfortable with.
2. **Second Collaborative Session Work**
3. **Optional: Create a mind map or card/sticky note map for your group venue and/or format**



## Resources

American Institute for Research <http://www.air.org/>

### **Bridgeline Rentals:**

[www.freeconferencingaalling.com](http://www.freeconferencingaalling.com) free rentals. This service also has an option for breakout “rooms.” Recordings are free.

[www.instantconference.com](http://www.instantconference.com) free rentals. Recording are free and can be listed to by phone but only available until you record over it.

[www.freeconference.com](http://www.freeconference.com) free rentals.

[www.mrconference.com](http://www.mrconference.com)

[www.budgetconferencing.com](http://www.budgetconferencing.com)

[www.freeaudioconferencing.com](http://www.freeaudioconferencing.com) many options available including MP3 recording and download.

[www.freeconferencecall.com](http://www.freeconferencecall.com) provides a Bridgeline account as well as free audio/podium/play back facility until you record over it. The account is valid for 120 days after which time you have the option to renew again at no cost. Includes selected European countries.

### **Webinar Services:**

[www.webex.com](http://www.webex.com)

[www.Gotomeeting.com](http://www.Gotomeeting.com)

[www.elluminate.com](http://www.elluminate.com)

[www.maestroconference.com](http://www.maestroconference.com)

### **Other Interactive Computer Software:**

[www.Skype.com](http://www.Skype.com) - provides computer audio communication for groups.

### **List your group in online event hosts such as:**

Evenbrite: [www.evenbrite.com](http://www.evenbrite.com) – enables you to send out personalized invitations and take online registrations

[www.trainingclass.com](http://www.trainingclass.com) – you can list yourself for free as a service provider and list your group offerings



## ***Chapter 5***

# **Creating & Implementing the Group Plan**

### **Key Concepts**

- Creating the overall group plan, structure and set-up
- Creating the individual session plan
- Group process essentials

### **Connections to Be Made for the Group**

- Ensure delivery of all phases and components of the group as designed and promised to clients

### **Applications**

- Following a plan that incorporates all the intended aspects of design, structure, experiential learning and the Wellness Mapping 360° model.

## Why Have a Chart or Plan

The plan is what pulls all the pieces together into an integrated whole. A good planning model or design tool will help ensure that you have looked at, thought about and included what you want and have excluded anything on purpose rather than by accident. It acts as a check-list. The completed plan allows you to follow your design and assess as you go.

For the participants and any SMEs or co-leads, it creates a container that everyone can rely on for structure and content, planning and tracking time. For the coach and third parties it creates the framework from which to evaluate the group. Did it deliver what it was supposed to? What worked well – what would you change?

## Pulling It All Together - Information to Line-Up Before You Begin

### How Well You Know Your Client

- Will the group be sponsored by an organization? Will clients come to this group as part of an internal employee wellness or support program, a Wellness Program, or through another form of advertising/promotion?
- Do they have a common health challenge?
- Is there an ethnic and/or cultural and/or religious shared background?
- What if any special needs do they have?
- How old are they?
- What are their issues and challenges?
- What is their socioeconomic status?
- What is the educational level?
- Where are they geographically?
- When are they available?
- What do they want to get out of the group?
- What venue are they comfortable with

### The Overall Design

- What is your vision for the group?
- What is the focus or theme of your group?
- What is the venue?
- What is the structure?

### The Wellness Mapping 360° Model

- How will participants know their stage of readiness?
- How will participants define their well life vision? Will they come into the group with it or define it during the group?
- How will participants define their area of focus and goals? Is the group focus the area of focus for all or will participants define their own? Will they come into the group with area of focus and goals or define them during the group?

- How will participants identify actions steps?
- Will participants track their progress or define another method to know that they are successful?
- How will you establish accountability in the group?
- How will participants evaluate their progress?
- How will you evaluate the group?
- What does the Third Party require?
- Will there be measurable outcomes?

### **Structured and Experiential Learning**

- Will there be specific didactic education?
  - What is the intent? How will it be presented?
  - All sessions/some sessions?
  - Who will present it? Will you switch hats / include another SME
- What experiential learning will you incorporate?
- What assessment tools would be useful?
  - Before, during and after the group
  - For the 'in between'

### **Create the Group Chart or Plan**

The plan has two parts. The high level overview of the group – looking down from 5,000 feet - and the individual session plans that gives us the details 'on the ground'. The Overview may be thought of as the blueprint for the group while the session plan is the nuts and bolts. Each has a specific purpose and function.

#### **The Overview**

This is the high level description. Anyone who reads it will understand the intention, goals and desired outcomes for the group. They will have a picture of how the group will be offered and who its participants are. This description could be used for third parties, for a contractor organization or as part of a proposal. It will provide you with a definition of the service that you are delivering and form the basis for determining what and how you will evaluate the group. The Overview includes:

1. The Group Title
2. Group Sponsor Information (if applicable). This is Third Party, Wellness Program or other co-sponsor information. The name and the overall role of the sponsor.
3. The Group Focus/Intention and Theme (if applicable)
  - The Wellness and/or Health Focus
  - The Overall Goals of the Group
4. The Expected Outcomes
  - What participants should expect to gain from the group experience
  - Any expected outcomes for the Third Party
5. A brief description of the audience and any special attributes
6. Structured educational components (if applicable)

7. Overall Delivery Information
  - Venue & structure
  - Duration (dates when known)
  - The length of sessions
8. The Group Leaders – Co-leads and any additional SMEs
  - Who they are
  - Their qualifications
  - Their responsibilities

## The Session Plans

This is the session-by-session outline that gives us the nitty gritty of **what**, **when** and **how**. The session plan includes:

1. **The Session Purpose:** the overall intention or objective for this session. The session purpose should tie back to the group overall purpose and outcomes.
2. **The Session Goals:** one or more specific goals for the session. Goals should support the session purpose and tie back to overall outcomes of the group.
3. **Plan:** the content that supports the purpose and goals. It is the vehicle to arrive at the outcomes. The content includes a breakdown by segment. A segment is a period of time in which a particular activity is conducted. For each segment include:
  - The **Length** of the segment
  - The **Content/Topics** The focus of that segment (e.g. designing the alliance, individual introductions, establishing ground rules & agreements, check-in, nutrition education, wrap-up - review what was covered & statement of action step)
  - **Wellness Mapping 360° Application**
  - **Activities** what will done in that segment (e.g., laser coaching, group discussion, guided visualization, interactive exercise, use of a group coaching tool, teaching)
  - **Materials** (tools, etc.) required for that segment

## Homework

Because what happens in between the coaching sessions is often where the biggest part of the work, growth and change, it's important to identify how you want to structure it for the group. Whether this is a half-day, one-day, two-day or 12 week group, the participants need to know what they will take away as action steps.

How will the work that takes place in-between sessions be determined? Is this a group where all participants are working on the same thing (e.g., defining their vision, values and area of focus)? In that case you may have specific 'homework' that everyone works on between sessions. Or will the homework (next steps) be determined by each participant while in the group session?

Do you want to use buddies? If you do, how do you want the participants to use their buddy or buddy sessions?

## Group Implementation

### Pre-Group Participant Contact

What opportunity will you have to contact potential participants prior to the group? What is the best method to use? If you cannot have a pre-contact you will need to identify in the very beginning of the group any participant concerns, determine if all members are appropriate for the group and are looking for a group experience rather than a class. You may want to have them complete a form and/or cover these topics first.

### First Session Essentials

There are a few things that should be included in every first session to establish the coaching alliance, establish safety and create the 'container' by setting up ground rules and agreements, and begin to create connectedness. This is the time for specifics and logistics. The fundamentals include:

1. **A welcome and introductions:** the Coach(s) and SMEs & Group Participants.
2. **Statement of the purpose of the group:** here is where you set up expectations and parameters. This is identified in the Overview.
3. **Cover the group logistics:** when and where the group meets (especially important if a week or session is skipped due to holidays, etc.), the number of sessions, the start and end time.
4. **Establish the ground rules & agreements:** state all negotiable and non-negotiable ground rules and the difference between the two categories. Identify the group agreements. Agreements are best made and kept when there is ownership. Request the group to identify agreements that they find important. Ensure that confidentiality is included in agreements.

#### EXAMPLES of Ground Rules:

- What to do if someone cannot make a session – who to contact
- What to do if someone arrives late (e.g. who to contact if known ahead of time that they will be late; how to enter the group)
- Food and drink – what is OK what is not OK
- Clothing (as applicable) especially if there are any activities that require special clothing (e.g., loose fitting)
- Telephone etiquette (for virtual group)
- In group etiquette
- Signing a Consent Form (If you are ICF certified and want to include the participants in your list of clients you will need to obtain their consent).

#### EXAMPLES of Agreements:

- Arrive on time/end on time
- Confidentiality – what is said inside the group remains inside the group
- Be fully present in the group

- Attend all sessions unless sick or there is an emergency
- Address one another with respect
- Listen to one another as you want to be listened to
- Ask other participants if they would like feedback or suggestions before offering it

**Request Commitment to all ground rules and agreements:** it is important that each participant indicates that they will commit to all the named ground rules and agreements. Never assume that simply because they have been stated participants will honor them.

### **Describe the Group Process**

- The structure of the sessions
- Any educational components
- Homework
- Set up Buddies (if this is part of your design)
- Introduce any tools that you will be using
- Identify anything the participants will need to bring (e.g., journal)

**Ask for Questions regarding what has been said so far:** give time for participants to ask questions; keep the questions limited to the topics presented so far.

## **Group Process Essentials**

### **Introduce the Session**

Identify what will happen in the session even if the structure is similar from session to session. Identify any materials they will use.

### **The Check-in and Time Management**

Whether you meet for 60, 90, or 120 minutes for each group meeting, the time will evaporate with astonishing speed. It is vital that you keep one eye on your watch or clock and, as in an individual session, encourage group members to be time conscious also. Begin on time (let the stragglers learn by experience, their tardiness will usually not continue). End on time (show the same courtesy for their time at the end and it will be returned with prompt attendance at the beginning).

Checking-in is a process that allows each group member to feel acknowledged, included, and heard right at the beginning of the group. It is **not** a time to work on challenging problems. It is simply a time to:

- Greet the group and exchange acknowledgement
- Make a quick statement on how they are doing with their committed action
- State what they would like to get out of or work on in the group today

You can be creative in the check-in structure in terms of what is stated by each participant. Sometimes people do not do what they committed to do at the end of the last session. It is however important to find something genuine to acknowledge within oneself and to be acknowledged for, even if it is having partially completed the action,



learned something or just having shown up for the group to persevere. What we do know from neuroscience is that it is highly important to people to be viewed in a positive light by others and if they feel shamed or embarrassed those emotions will have an impact on their learning ability. If our emotional brain center (the limbic system) says “trouble”, access to the brain’s learning center shuts down. But if the limbic system says “great!” the client is ready and open to the new learning that the so-called failure can provide.

To avoid embarrassment and create an opportunity for learning later in the process you can structure check-in in a way that helps participants identify success and name anything special they want to get out of the session and/or special challenges they are facing. For example, the check in might be structured to name one way in which they were successful, state what they would like to get out of today and/or state the challenge they met in not doing what they committed to do. This promotes both self-love and self-responsibility in the group.

And you need to do the math and watch the clock. If you have ten group members and each takes five minutes to “check in” there goes your first fifty minutes to an hour! So, you will need to determine a realistic amount of time per member, say two minutes or less per person. Use your best laser coaching to help them stay focused, get to their points, and move on.

### **The Feedback Process**

It’s important that fellow group members be more coach-like with each other. That is, groups function best when the members are accepting and not critical, supportive but not too directive, empowering and not rescuing. Group members will learn this from you and how you both structure interaction and communicate with each one and the group as whole.

Do not let your group deteriorate into a problem solving group through suggestion making process. When group members start making one suggestion after another to a group member (suggestion tennis), coaching takes a back seat. Use respectful interruption to bring the group back, state what is happening and what is wanted by the group.

### **Facilitate Group Interaction**

We want to facilitate group members speaking directly to one another. As they feel more included, safe and comfortable with the group structure and format they will interact more and question each other more. Encourage them to speak directly to each other instead of going through the group facilitator. Group activities that have members pair off and discuss will also facilitate more acquaintance and interaction.

## Dealing with Difficulties

Being able to deal with difficulties or challenges that come up in the group can best be handled if you are prepared for the types of challenges that may arise along with your ability to ‘dance in the moment’. Not everything can be anticipated or prepared for. We will look at some very specific types of challenges in Chapter 10.

## Handling the Discussion

Some basic rules of thumb apply to coaching in general, but are essential to group coaching.

1. Leave your own views outside the group. Bringing them in is the best way to lose the group’s confidence
2. Clarify key points that are made; if you don’t understand a comment that is made, others in the group may not either
3. Help the group spot connections and over-all themes
4. Summarize using the words of the participants. Avoid biased or selective summarizing and use simple language
5. Probe general statements for meaning
6. Use language familiar to the group. You don’t want to set yourself apart
7. Avoid ‘death by feedback’ by keeping feedback time limited
8. Think about the pace, direction and mood:
  - Move the group on when stuck on one issue
  - Remind the group often of the question being discussed
  - Keep an eye on the time and be ready for midway program redesign if needed - This is where ‘dancing in the moment’ may also come into play

## Ending the Session Essentials

It is important to tie together ‘where they came in at the beginning of the session’ to ‘where they are going when they leave the session’ and to identify what participants will do ‘in-between’ sessions. The participants came into the session with “how it went with last session’s action plan” – moved into an opportunity for learning and/or insight and how to apply it and now must leave with “what’s the next step”.

You want to:

1. Summarize for the group what they have been doing: state the initial objectives, themes of discussion.
2. State ‘what’s next’ - the next session (date/time/location), homework or research, any changes.
3. Each participant commits verbally to what they will do between now and the next session.
4. Give people time to ask questions or a way to ask questions later.

## Ending the Group Essentials

The end of a group is a big deal. It's a transition from having a place and time and community where they have been seen, heard and acknowledged; encouraged to stretch in new ways and to take steps towards change that impacts their whole life. They are moving towards working on their own to integrate new learning and behaviors into their lives. Moving on can mean risking falling back, losing support and feeling sad. Ending the group is a process that begins at the very beginning of the group where you want to promote connectedness that can carry forward when the group ends. At the end of the group you want to:

1. Acknowledge the participants for their work, courage and commitment. This may be done verbally and/or with a certificate or totem.
2. Include "what's next" planning and commitment.
3. Replay to the group what they have been doing: the objectives, themes of discussion and the activities.
4. A closing exercise can provide a strong sense of closure.
5. Provide time for sharing any feelings and take-aways.
6. Give time to ask questions or a way to ask questions later.
7. Get Feedback (See **Group Evaluation** below).

## Group Evaluation Essentials

### Participant Self-Evaluation

The participant evaluation identifies how well the participant met their own desired outcomes. This is critical for participants to acknowledge their progress or learning. This may be accomplished through:

- Using biometrics 'before and after'
- Using before and after inventories/Instruments
- Self-Report

### Group Evaluation

The participants' evaluations of the group is very important feedback for you as coach/facilitator and for any third parties. With this evaluation you want to assess and identify:

- If the group met the participant expectations
- If the group met the objectives that were set for the group
- What participants would like to be different
- What participants would like more of
- What would participants would like less of
- What participants learned

## **Coach Evaluation**

Understanding how effective the coaching/facilitation and any learning components were helps you continue to evolve your work. Assessing your work as coach can be done through a combination of tools and feedback methods including:

- Coach self-evaluation
- Co-leader debrief
- Use the group evaluation feedback tools and the participant's individual evaluations and progress.

## **Homework for Chapter 5**

1. What's the difference between ground rules and agreements? What's critical about each?
2. How does the SCARF model apply in each of the essential components for group structure?

## **Resources**

**Refer to Appendix A**

## ***Chapter 6***

# **Principals of Adult Learning**

### **Key Concepts**

- How adults learn
- Learning styles
- The intersection of experiential learning & group wellness coaching

### **Connections to Be Made for the Group**

- The relationship between learning and coaching

### **Applications**

- Setting the foundation for effective learning
- Engaging adult learners
- Integrating different learning styles
- Knowing your learning style and your learning style bias

## **Essential Principles of Adult Learning**

An understanding of adult education principles can enhance the impact of your group and ensure that participants' needs are being met.

### **Adult Learners Are:**

- Autonomous, self-directed and relevancy oriented
- Have accumulated a foundation of life experience
- Practical
- Goal-oriented
- Want to be shown respect and positive reinforcement
- Prefer Interaction

### **To Engage Adult Learners**

- Integrate life experience
- Have participants take ownership of the learning process
- Co-create agenda and activities whenever possible
- Emphasize process more than content
- Apply the following assumptions to the design of learning:
  - Adults need to know why they need to learn something
  - Adults need to learn experientially
  - Adults approach learning as problem-solving
  - Adults learn best when the topic is relevant or of immediate value

### **Create an Active Learning Experience**

- Active learning is a dynamic process. It entails continuous adjustments and re-organizing of different activities such as talking and listening, interactive exercises, reflecting and learning components
- Mix it up to make it interesting

### **Set the Coaching Foundation for Adult Learning**

- Create a safe and confidential environment
- Establish clear ground rules and agreements in the beginning
- Create opportunity for participant ownership
- Co-create the agenda and exercises whenever possible
- Create opportunities for self-discovery
- Leverage life experience and tie-in learning in the group to life experience

## Experiential Learning & the Coaching Model

In the human change process learning is not a by-product of action but an equal and complementary force. The desired outcome of coaching is both action and learning, which combine to create change. The connections among action, learning and the core coaching principles are synergistic and drive the coaching process.

### Key Components of Experiential Learning

David A. Kolb, PhD and past professor of Organizational Behavior in the Weatherhead School of Management at Case Western Reserve University, Cleveland, Ohio along with and Ron Fry identified a new experiential learning paradigm and developed the Experiential Learning Model (ELM). Kolb is also the founder and chairman of Experiential Bases Learning Systems, Inc (EBLS).

His model is composed of four main elements. It is described as a spiral because it may begin with any one of the four elements listed below; but typically begins with a concrete experience.

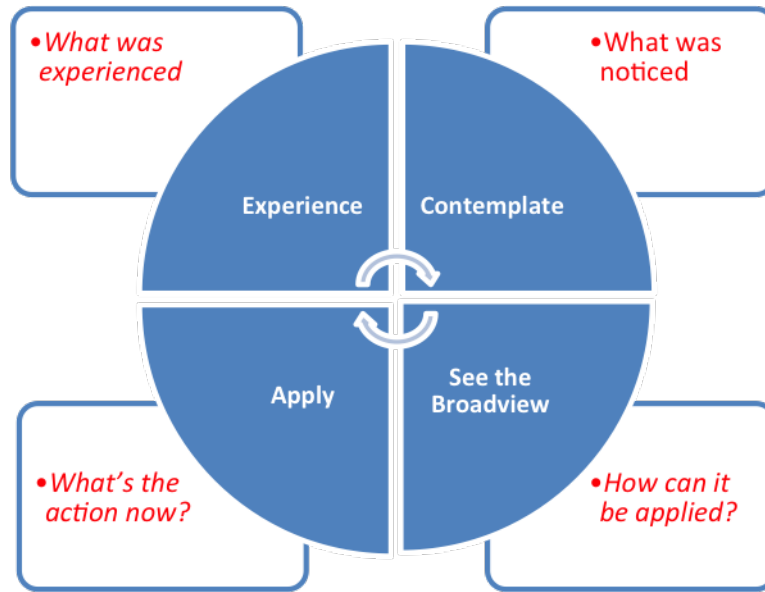
- Concrete experience
- Observation of and reflection on that experience
- Formation of abstract concepts based upon the reflection
- Testing the new concepts

### The Coaching Model - Deepening the Learning & Forwarding the Action

The coaching cycle parallels Kolb's learning paradigm.

1. **Coach requests action – Client experiences that action:** the “what the “what.” It can be experiencing an activity, a success, a ‘failure’ an inner awareness, an obstacle, or even the gremlin.
2. **Coach uses exploration - Client contemplates/observes/reflects on the experience:** Identify what about it means something or makes a difference – what the learning is.
3. **Coach & Client use learning to see the broader view and forward the action:** Identify how this experience fits into the bigger picture of your client's life. See how it can be applied in a broader perspective. This may often become an “aha” moment. This is used to identify/define/re-define the next action.
4. **Coach requests action – Client experiences the next action:** the new “what.” It now includes learning and takes on new fortification.

The coaching cycle repeats with new awareness and experience. The client's learning process is a building process that may include success and failure, trial and error, learning and forward movement. Both success and failure can fuel learning and move the client along their path.



## Learning Styles

Most learners have a stronger preference for visual or auditory or kinesthetic learning. They all overlap in some ways. What's important is knowing what your clients prefer and then mixing it up to accommodate the group.

### Visual Learners – Respond to What They See

- 60% of adults prefer visual learning
- Visual learners like hand-outs (as applicable), charts, flip-charts, pictures, PowerPoint's for a virtual group
- Visual learners respond to colors, shapes, design
- Drawing can be both visual and kinesthetic

### Auditory Learners – Respond to What They Hear

- 12-18% of adults prefer auditory learning
- Auditory learners like presentations, explanations and discussion
- Auditory learners may want to repeat what they heard

### Kinesthetic Learners – Respond to What They Experience (Activity/Touch/Sensorial Experience)

- 18-30% of adults prefer kinesthetic learning
- Kinesthetic learners like to participate in hands-on exercises
- Drawing
- Trying it out
- Body-centered coaching: uses physical and sensorial awareness and experience

## What's Your Style?

Be aware of your preferred learning style. Pay attention to how your preference may create bias in your plan and structure. Try to include a variety of approaches. Go outside your own preferences and comfort zone.



## Using Assessments to Understanding Learning Style and More

Generally people know their preferred learning style (auditory, visual and kinesthetic). Often they will identify a primary and secondary style or two primary styles. However there are assessments that can identify preferred learning style and much more that can be of value to the individual group member and to the coach. Different assessments take into consideration thinking process (e.g., instinctive, methodical, deliberate), preferred approach to learning and how they approach the world including cognitive, intuitive, emotional and sensorial tendencies and preferences. Assessments can point to communication style, leadership style, stressors, motivators, life values and operational values as well as strengths, blind spots and opportunities for growth or negative characteristics.

### Value to the Coach

- Assessing the fit of individuals for a group
- How best to facilitate/coach individuals in the group
- Coach's preferences and where they may have blind spots
- Coach's opportunity for growth

### Value to the Clients

- Permission to be who they are
- Insight into strengths they have not recognized or honor
- Insight into opportunities for growth
- Insight into how they differ from others – and others from them
- Opportunity for developing tolerance and appreciation of others' styles

## Different Assessment Tools

There are many different types of assessment instruments. Some are more in depth, some require more time to take, and some require an automated tool or expertise to assess the results. Three different assessment tools are:

### 1. The Gregorc Style Delineator – from Mind Styles™

- Based on 20 years of research of Anthony F. Gregorc
- Identified 4 different styles
- A word preference matrix (selection of a preferred word in 8 rows of 4 words in each row)
- Not very expensive
- Brief and very easy to take and score— can be given to the client to take and self-score
- Results provide a profile of dominant style characteristics. Helps individuals gain a better understanding of self and others
- The tool provides the user with a description of 6 categories within each of the 4 styles. So the user can identify their style and its characteristics immediately

## **2. Myers Briggs – Personality Profile**

- Originally developed by Katherine Cook Briggs and her daughter, Isable Briggs
- Designed to measure psychological preferences that were extrapolated from the typological theories proposed by Carl Jung
- A longer questionnaire designed to measure psychological preferences in how people perceive the world and make decisions
- It identifies 16 distinctive personality types that result from the interactions among preferences
- More expensive – requires interpretation by a Myers Brigg expert
- Results provide a profile of preference for using either the judging function (thinking or feeling) or the perceiving function (sensing or intuition) when relating to the outside world; and whether the individual is an extravert (“outward-turning) or an introvert (“inward-turning”)

## **3. VARK**

- A questionnaire that provides users with a profile of their learning preferences. These preferences are about the ways that they want to take-in and give-out information
- Is structured specifically to improve learning and teaching.
- Must be administered and scored by VARK resource
- Can be taken online
- Supports those who have been having difficulties with their learning and has particular applications in business, sports, training and education
- Mentors, trainers, teachers and coaches who would like to develop additional learning strategies can also benefit from using it

## **4. Kolb Learning Style Inventory**

- Built upon the idea that learning preferences can be described using two continuums: active experimentation-reflective observation and abstract conceptualization-concrete experience. It is designed to determine an individual’s learning preference
- Identifies 4 types of learners
- Can be taken on-line
- 10-15 minutes to take

## Homework for Chapter 5

### Exercise:

1. Identify what your preferred learning style is.
2. On a piece of paper draw 2 columns – Write POSITIVE IMPACT at the top of one column and CHALLENGE at the top of the second. Based on your preferred learning style, write how it will work well for you and what will be a challenge for you as a group coach in each column.

### Optional

Identify a technique from a non-preferred learning style to try out with your buddy or a friend

### Resources

- <http://gregorc.com/>
- <http://www.myersbriggs.org/>
- [Theory of Multiple Intelligences](#) explains Howard Gardner’s work which is based on
- seven different types of intelligence.
- [VARK: A Guide to Learning Styles](#) specifically focuses of verbal, auditory, and
- kinesthetic learning styles.
- Visit: <http://www.ldpride.net/learningstyles.MI.htm> or <http://www.learning-stylesonline.com> for more information and free assessments.



## ***Chapter 7***

# **Integrating Learning**

### **Key Concepts**

- The application of 'Experience Based Learning'
- The parallel between experience based learning and the coaching process
- Integrating teaching segments
- The critical components of learning exercises

### **Connections to Be Made for the Group**

- Facilitating learning through experiential and structured learning segments

### **Applications**

- Using experiential learning
- Using structured learning
- Effective integration of experiential and/or structured learning

## The Role of Experiential Learning and Teaching in the Group

Learning is an inherent and natural outcome of group process. Group members learn from their own experience and that of fellow members through discussion, feedback, inquiry and challenging one another. That learning can be punctuated and often exponentially deepened by integrating fun, creative, compelling and simple experiential exercises and through specific educational or teaching segments.

Integrating experiential exercises is a critical component in all groups for facilitating learning and maintaining the group's attention. People tend to lose focus unless there is some variation in the process every 7-10 minutes. Experiential learning offers an opportunity to explore an issue, theme or topic in different ways and complements group discussion.

**“Exercise forms the backbone of any group coaching .....program”**

**Jennifer Britton**

Teaching is optional. It may be considered critical for the specific theme and focus of a group – but is not a necessary component for all groups. In health & wellness group coaching teaching segments may be a vital element of the group design and of significant motivational value towards lifestyle change by providing key cognitive understanding and awareness. Education can also help with the “how to’s” in making change.

## Experience Based Learning

Experiential exercises may be seen as the concretizing element of group process. They add an “in the bones” quality that intensifies focus, increases awareness, and empowers adult learning. They can serve to create context and inspire inquiry. Very much akin to the statement that “a picture says a thousand words,” experiential exercises can take people to a place that hours of talk, listening or viewing alone cannot.

They also serve to facilitate connectedness and a sense of community in the group. At the very beginning of a group participants may feel unsure and insecure about how they are viewed by the other participants and what their place will be in the order of things. The vast majority of adults want to be acknowledged in some appropriate way and to be liked. They also need to understand what is going on and how they fit in.

As the group progresses, experiential exercises can server to develop and strengthen rapport and explore themes while promoting discovery and those “aha” opportunities. At the end of the group they can help to create closure, to set the stage for continuity of commitment and action, and to re-enforce ongoing connectedness. We can ‘speak to’ the group audience in a variety of adult learning styles through the usage of different experiential exercises. One exercise can incorporate two or even three different styles of learning.

## The Background of Experience Based Learning

In chapter 3 we looked at David A. Kolb's Experiential Learning Model (ELM), which is composed of the following four elements:

1. Concrete experience
2. Observation of and reflection on that experience
3. Formation of abstract concepts based upon the reflection
4. Testing the new concepts

According to Kolb, learning involves the acquisition of abstract concepts that can be applied flexibly in a range of situations. In his theory, the impetus for the development of new concepts is provided by new experiences.

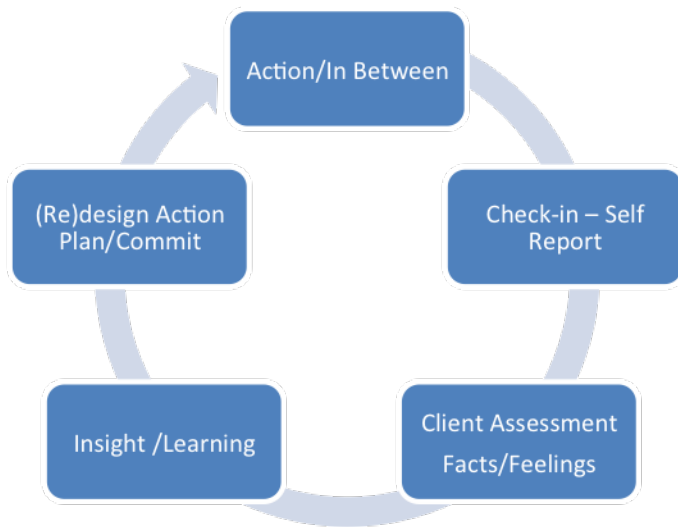
**“Learning is the process whereby knowledge is created through the transformation of experience”**

David A. Kolb

## The Intersection of Group Coaching & Experience Based Learning Theory

In the coaching experience the coach requests action and the client commits to action step(s) towards a goal. In taking the action the client has a new experience. Even if the client has experienced the action before in some way, it may be considered 'new' because it is taking place in 'the now.' It is within the context of the client's now plan and taking place from the client's now perspective and where the coaching process is right now. The client experiences some learning whether it is what leads to success, or creates awareness of what keeps the client from succeeding, or simply what is important. The client has an opportunity in the 'in between' and in the coaching process to assess their experience, identify their take-away from it and assess how they can use it going forward. The client can take the learning and adjust, subtract or add to their plan including goals and next action steps - and keep what they experientially know is working well.

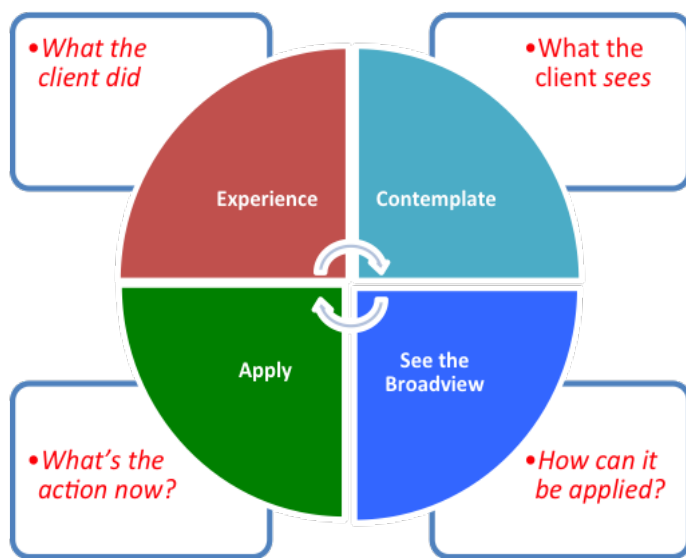
## The Coaching Action/Learning Cycle



The client's process may be seen as:

1. Taking action – What the client did
2. What they see/assess/feel about what they did
3. How they apply the learning from it
4. Designing the next action & committing to it

## The Intersection of ELM and the Coaching Action/Learning Cycle





## When to Use Exercises

There are many possibilities for inclusion of experiential exercises. They may be:

1. **Pre-determined and built into your group plan** based on themes and in support of connection and learning.
2. **Impromptu – “Dancing in the Moment”** to deepen the learning. If time and structure allow, you as coach may see an opportunity to incorporate an exercise that was not pre-designed into the plan.
3. **In-Between Sessions – ‘homework’** exercises may be designed to support and deepen learning and/or to reinforce the group’s theme.

## The Four Essential Purposes for Exercises

Integrating exercises into the group generally serves one of four purposes. These Include:

### 1. Creating Connection

- Build connection in the beginning of the group
- Develop trust and connectedness during the group
- Facilitate using one another for support in group and out
- Model ‘how to’ get and use support

### 2. Punctuating or Locking-In

- Lock-in learning during or following a structured teaching segment
- Punctuate a theme or topic using a kinesthetic exercise, or combination of auditory and/or kinesthetic and/or visual components

### 3. Promoting Self-Exploration & Discovery

- Deepen the learning
- Create opportunities to ‘get out of your head’ – tap into intuition or inner wisdom without intellectualizing
- Tap into the wisdom of the body

### 4. Creating Closure

- Lock-in the learning from a session or group and create the springboard to move forward
- Establish commitment

## What to Consider When Planning Exercises

Introducing group exercises simply for the sake of something to do may backfire and be counterproductive. Too many exercises or too lengthy exercises can blur the focus as participants can get lost in a series of instructions and simply not having the opportunity to digest what the exercise is intended to provide.

Using exercises, whether interactive (engaging participants in dyads and triads or the whole group interactively) in or non-interactive (engaging the participants in individual activity such as a guided visualization) must be thought-through. As you assess the **what, when & how** consider:

1. Does it support and fit with the stage of the group?
  - Beginning, middle or end
  - Forming, Storming, Norming, Adjourning – or Reversal
2. Who is your audience? Do they have physical restrictions?
3. Will it ‘call them forth’ out of their safety zone – enough but not too much?
4. Will it support different learning styles? You want to be prepared to address multiple learning styles. Be flexible – don’t get ‘married’ to any specific exercises or types of exercises. Having options available to you gives you the flexibility to match the best exercises for your group as you get know them better. It also allows you to adjust intuitively ‘in the moment’.
5. What types of exercises will support the overall purpose of the group? Will it have meaning for all participants and help develop greater awareness or new insights?
6. How will it tap into the wisdom of the participants and the collective group wisdom?
7. What types of exercises will work well in your venue (in person or virtual). Do not however jump to conclusions about limitations for a virtual format. Knowing your audience can create an opening for an exercise that you may otherwise dismiss.
8. Are there any logistical issues/concerns? Will the environment or session length promote or restrict specific types of exercises. Consider sound, space for movement or setting up, use of any required materials and how long the exercise will take.
9. Does it meet coaching integrity ?
  - Does it fit the context of the foundation for confidentiality, safety & agreements?
  - Does it support an environment of mutual trust?

## **Two Phases of Exercise Activity in the Group**

### **Phase 1 – Identify & Conduct the Appropriate Exercise**

### **Phase 2 – Debrief the Exercise**

## Identify the Appropriate Exercise(s)

There are six overall categories of exercises that support different stages of the group and the session.

### Initial 'Ice Breakers'

The dynamic of an Ice Breaker is to satisfy participants' needs to establish an appropriate social relationship with other participants and with the coach(s)/ facilitators, and preview the style and content of the group.

#### Examples:

- Dyad: Introduce yourself – then introduce your partner to the group
- Triad/Small Group: Uncover 3 things all members of this small group have in common
- Short Group Mingle: participants walk-around and meet 3-4 people, ask them specific questions and then share what they learned about those people in the large group.

### Rituals to get centered & focused at the beginning of group sessions

#### Examples:

- Count off (everyone has an assigned number - beginning with #1 – each participant calls out their number)
- Centering exercises (deep breathing – shaking arms & legs – short meditation)

### Exercises to promote in-group learning

These may relate to the group focus, emerging themes, the Wellness Mapping 360° process. Exercise may include Wellness Mapping 360° assessment and exploratory tools, other tools or you may choose to develop or create your own exercises.

#### Examples:

- Wheel of Life
- Visualizations
- Well Life Vision
- Values Clarifications
- Interactive dyads/triads with a powerful question to explore
- Journaling
- Self Permission/Self Denial Inventory
- Thematic and/or related to a specific learning segment ( e.g., breathing exercise to support teaching around stress reduction)

### Exercises to support learning – 'in-between' sessions

These exercises may be thought of as “homework” or “buddy work.” They may apply to the entire group or to individual participants. They may be thematic or relevant to specific phases of the Wellness Mapping 360° process.

#### Examples:

- Wheel of Life
- Values Clarifications
- Creating a Vision Board
- Journaling
- Practice an exercise from a learning segment

## Exercises for Closure – End of Session

Exercises may be designed to create a closing ritual that focuses on commitment for the in-between activity and provide inspiration to ‘get to it’.

### Examples:

- Name the Next Step: each participant stands and states out loud their action step
- Popcorn (quick, out-load and energetic): each participants expresses one word or mantra that describes their take-away from the session and/or what they are embracing for the ‘in between,’ or describes their intention (e.g., power, joy, determined, jazzed)
- Closing circle: standing or sitting – holding hands – and/or raising hands above heads –each stating a word or collective mantra defined by the group.

## Exercises for Group Closure – End of Group

At the end of the group a closing ceremony is very important to acknowledge the work that has been done, celebrate participants for having completed the group and any accomplishments along the way, and to make a commitment to ‘what’s next’.

### Examples:

- Crossing the Line: Commitment for going forward (See Appendix B)
- Graduation Ceremony – with a certificate
- A Take-Away Structure: each participant selects a totem that can be used as a structure to remind themselves of their learning and commitment. This is provided by the facilitator or organization and is symbolic in some way (e.g., a stone or crystal, pin, etc.)
- Leaving Behind/Moving Towards: Commitment for going forward (See Appendix B)

## Identifying Exercises for Virtual Groups

Just because a group is remote/virtual does not mean that you cannot use exercises or interactive exercises. In a certain sense, employing exercises in a virtual modality may be even more important to maintain engagement in the group. The essential difference is identifying what will work remotely. Many similar types of exercises used in in-person groups can be used in the virtual group.

### Examples:

- Drawing – Coach describes a process or form to draw and fill in
- Wheel of life
- Guided Visualization
- Dyads & tryads can be used with telephonic technology that allows ‘break-out’ groups.

## Conducting the Exercise

### The Importance of Good Instructions

Although this may seem obvious, even the most seasoned coaches may find themselves facing a sea of confused faces or silence after giving instructions for an exercise. There will undoubtedly be at least one individual who does not understand what has been said. Make the instructions very clear, simple and easy to remember and do not make any assumptions about whether they are understood. Always include *what*, *where*, and *how long*. What they will do, where they will do it and how long it will take – if the exercise includes dyads or tryads, add how long for each person. If additional instructions will come later – let them know up front. Also let them know who is responsible for knowing when to end and if they need to watch the time or if you will indicate the end. If you are responsible tell them how you will indicate the end.

There are many ways to go about this. Write them on a board or flip charts for in-person groups. For virtual groups use PowerPoint or a virtual white board if you are using technology that supports that, or email instruction or questions that the group will be considering ahead of time. If you email, the best policy is to request confirmation of receipt from the clients themselves. Always ask at the beginning of the group whether they all saw the email. Let them know ahead of time of you will be emailing instructions and anything else out. Try to avoid last minute emails.

Inquire if everyone is clear on the instructions. Repetition may be required, however be aware of the anxious individuals who may want you to repeat again and again or barrage you with questions. In this case you may want to simply ask them to do their best.

### Materials

You may not always need materials for experiential learning, however for some exercises they may be required, provide a context for different learning styles or simply help to highlight the focus of the exercise. Always plan ahead. If your in-person group is meeting at an outside facility find out what they may have or what you will need to bring and what you can leave for future sessions or what you will need to cart back and forth.

If you require participants to have materials with them that they must bring from home let them know in the pre-meeting and repeat it during the first session. For virtual groups or in person groups you may want to email requirements and reminders.

### Executing the Exercise

Once you have given the instructions turn it over to the participants. This is where the magic happens and it is a private time for them. Be clear that the exercise is beginning and be clear when it is over. As a facilitator you need to move the process along to ensure adequate time for the exercise and for the debrief.

## Phase 2 - The Debrief

Exercises are a wonderful tool and structure to punctuate a theme, deepen the learning, tap into vision and motivation, and create inquiry. However, without a debrief process the intent of the exercise may not ‘land’. The debrief is as important as the exercise itself. The debrief allows participants to reflect and integrate the experience.

A debrief may be as simple as having participants notice and share or journal privately or may entail deeper group discussion in dyads, triads, all together or any combination. As part of the debrief, you might ask a specific question for the group to think about and discuss. You need to plan time for the debrief. The rule of thumb is to plan at least as much time as the exercise or double it. If an exercise is allotted 7 minutes – then plan 7-14 minutes for the debrief. As you get experience with your group you can adjust accordingly. If you plan to give everyone in the group time to share in the debrief, determine how long that will take and plan accordingly. Running out of time is a common problem.

The only exceptions to the debrief are ice breakers, closure exercises and exercises designed to get participants present and focused in the group.

## Integrating Educational Learning

Your group may be designed to include impromptu learning segments or structured teaching segments.

### Impromptu Teaching Segments

If you are a SME wearing two hats you may discover opportunities during the group session to switch hats and include an ‘as needed’ brief learning segment in response to a request, a question or the content being discussed. As coach you may identify some aspect of coaching that you’d like to educate the group around (e.g., how to address the *gremlin*). Or you may simply see an educational opportunity that benefits the group in general around a specific topic. The rule of thumb on impromptu segments is that they are no longer than 2-3 minutes. In an impromptu segment there may also be an opportunity to include other group members in the ‘teaching’ – sharing what they know or have learned as well.

### Structured Learning Segments

Structured teaching can be delivered by the coach wearing 2 hats or by a second SME. The SME may be someone who stays with the group from beginning to end as a co-facilitator, comes in for specified sessions, or different individuals who present different learning segments.

The rule of thumb on structured learning segments is no more than 5-7 minutes in length. Therefore it is important to build the structured segments carefully into your plan, allotting time for the learning to

‘land’ – for reflection and integration of what they were just taught. In some cases, immediately following a learning segment or as a part of it, experiential exercises may be used to lock in the learning (e.g., a breathing exercise following a teaching segment on the physical impact of stress).

If you co-lead with a SME you want to work closely with them to ensure that they design teaching segments that are clear, specific and meet your time requirements. The group may include more than one teaching segment. Regardless of the number of teaching segments you want to make sure that:

- Teaching does not supersede group process where the group appears to be more of an education group.
- Adequate time is provided for a debrief after each teaching segment. The debrief following a structured learning segment is as important as with any exercise. It allows participants to absorb the teaching.

### **The Educational Debrief**

The debrief following a didactic educational segment is equally important although it is usually structured differently. The debrief allows the information to be absorbed more fully and to ‘land’. In this case the debrief provides participants the opportunity to ask questions and share thoughts. The debrief may also include looking at how they can take this new information and apply it. Similar to the experiential learning segment, you might ask a specific question for the group to think about and discuss. And like the debrief for experiential learning, you need to plan at least twice as much time as the teaching segment for its debrief.

You may also want to add a short experiential exercise following an educational segment; for example, experiencing a relaxation technique following an educational segment on the effects of stress and relaxation. Now you want to debrief both the didactic learning and the experience. You may do one at a time after each piece is completed or both together.

## **Experiential & Educational Learning In Between Sessions**

In the wellness group as in one-on-one coaching, using the 'in-between' for both experiential learning as well as education learning can complement and strengthen the in-group experience. As you develop your group plan you may want to consider whether this approach would benefit the group and is practicable for the participants. If it makes sense, think about what kind of exercises may support the participants in the context of 'homework'. Depending on the focus of the group, you may build in buddy work or interactive time together or exercises that create continuum from one session to the next. For example, participants in a group with a focus of creating their well life vision may design a vision board at home.

Participant reading, research and self-education around a topic that is interesting to the group can promote a sense of ownership of the material and provide an opportunity for the group members to teach each other.

Whatever participants do as a part of the group design in the 'in-between', having a debrief is very important. The debrief can be part of the check-in process or given a special focus and time of its own. To exclude the debrief is to invalidate the experience or learning. The debrief may include sharing what the experience was like, what they noticed doing it and what their take-away is.



## Exercises & Tools for Different Points in Group Process

Exercise	Tool	Purpose	Materials				
				Pre-Group	In Group/In Person	In Group/Virtual	Homework
Preparation							
	Readiness for Lifestyle Change Assessment	What stage the participant is at for each area fo focus	Assessment	x			
	Readiness for Lifestyle Change Assessment	Stage of readiness in the group			x	x	x
Creating Well Life Vision - Identifying Personal Motivation							
Visualizations/ Guided Journey	Many resources - CTI - Co-Active Coaching book/Coach U Book	Clarity around Well Life Vision Support for challenges	none		x	x	
Values Clarification	Many sources & types	Clarity around Well Life Vision Support for challenges	paper & pen		x	x	x
	Well Life Vision Tool	Clarity around Well Life Vision Support for challenges	Well Life Vision Tool		x	x	x
	Wheel of Life (Other)	Identifying Area of Focus Goal Setting	Desired wheel		x	x	x
	Well Life Focus Tool	Identifying Area of Focus Goal Setting	Well Life Focus Tool		x	x	x
	Wellness Map Tool	Identifying Wellness Plan	Wellness Map Tool		x	x	x

Exercise	Tool	Purpose	Materials				
				Pre-Group	In Group /In Person	In Group /Virtual	Homework
Group Process							
Ice Breakers	Many sources & types	Facilitate getting to know each other -create connectedness	varies		x	x	
DefinePriorites	Many sources	Hone in on motivation, area of focus, goals			x	x	x
Define Possibilities - The Miracle question	The Real Balance manual	Stimulate possibility thinking			x	x	x
Journaling	Journal	framework for your participants through inquiry, or it can be left up to them			x		x
Drawing	Drawing instruments	Can be used for many things - is both visual and kinesthetic	paper and drawing instruments		x	x	x
Create vision board/collage	Many sources	Identifying and holding the focus on the Well Life Vision	magazines, pictures, board or cardboard, scissors, glue		x		x
Future Self (CTI Exercise)	CTI - Co-Active Coaching book	Bring Future Self into exercises, inquiries, requests etc.	None		x	x	
Identify Strengths, Challenges, Opportunities and Barriers	Identify Strengths, Challenges, Opportunities and Barriers tool in Appendix	Help recognize, strategize & plan	Form or Pen & Paper		x	x	x
Your Wellness Logo	Appendix B	Not ready for the group	Drawing materials		x	x	x
Closure exercises	Many sources/ Appendix B	making closure special & celebratory					

Exercise	Tool	Purpose	Materials	Pre-Group	In Group/In Person	In Group/Virtual	Homework
<b>The Wellness Plan</b>							
	Weekly Tracker & Review Tool	Create a new behavior pattern	Hard or soft copy scale				x
	The Connection Scale	Explore areas for growth	hard or soft copy scale				
	Self Permission/Self Denial Scale	Self Permission/Self Denial Scale	hard or soft copy scale		x	x	x
	Group Coaching Prep form	Accountability and focus in the group	Form				x

## Homework for Chapter 7

Consider:

- How you can use experiential learning (interactive exercises, individual exercises) in your plan
- How you can use structured learning in your plan
- What exercises/tools you are thinking about using and how they would serve learning and/or action
- Include what you did with your buddy in the buddy notes (see Appendix A).

## Resources

<http://www.experientialexercises.com/>  
<http://www.experientialtools.com/>  
<http://www.albany.edu/cpr/gf/resources/Icebreakers-and-Introductions.htm>



## ***Chapter 8***

# **Integrating the Wellness 360° Mapping Model**

### **Key Concepts**

- Applying the Wellness Mapping 360° model in an organization
- Applying the Wellness Mapping 360° model in the group

### **Connections to Be Made for the Group**

- Having a wellness model & process structure for the group

### **Applications**

- Applying the 5 components of the Wellness Mapping 360° model throughout the group coaching process

## Integrating the Wellness Mapping 360° Model within an Organization

When you are working in an established system whether it is a medical organization, fitness center or a corporate wellness program and you have the opportunity to offer a Wellness Coaching Group, it is important to get everyone around you aware of and interested in the benefits of both the Wellness Mapping 360° model and the Wellness Coach approach. The more they understand the more support you will have. You want to:

- Assess how a Wellness Mapping 360° group coaching model will work in your organization
- Assess what you need to do to pave the way
- Assess what client population would both benefit from lifestyle change support and be most effective to work with
- Assess what specific group or population should be first
- Look at your current materials and systems and shift language and processes to be more coach like
- Identify any things from the Tool Kit that you think would work well and adapt them as needed to fit the organization

When implementing the Wellness Mapping 360° model in an existing system or with a team you will want and need the approval or buy-in of those you work with. As in most mergers of systems a synthesis of processes and information needs to take place. It is wise to get your management and colleagues on board and to talk through how doing the work in a more coach like way will serve everyone concerned. The more familiar those around you are with the Wellness Mapping 360° model and with the concept of Wellness Coaching the easier the process will be.

As you merge the Wellness Mapping 360° skills and information with your existing system you want to be the change that you are introducing. You can begin to do this by:

- Making the *mind-set shift* to being more coach-like in your organization's approach to the work.
- Begin to introduce and/or educate your organization's staff about the significance of lifestyle change and of wellness coaching.
- Determine how you might introduce and/or educate your organization's staff in the importance of and concepts behind *Readiness for Change* theory.

All the tools in the Wellness Mapping 360° Tool Kit can be adapted to belong to and fit your specific organization.

## **Applying the Wellness Mapping 360° Model in the Group Context**

### **Assessment & Exploration**

When we work with an individual client, assessment and exploration usually entails an initial discovery session followed by continued exploration and discovery along the way. In the coaching relationship coach and client investigate internal and external barriers, strategize, look at what is working, what is not, draw upon past experience and use trial and error to arrive at the right plan. Learning comes from failure and new found successes as our clients move forward along their path.

The process is similar for the group, but must account for and include all the participants in the group. Assessment must also take into consideration whether the group candidates are appropriate for a group experience and whether they fit the intention and focus of the group before everyone converges together. Having one participant who is totally out of sync with the group can potentially sabotage the entire group. Therefore group participant assessment actually begins before the group does. As in individual coaching you want to identify where each participant is in terms of their ability to gain from the group experience and to contribute to it.

### **Pre-Group Contact & Assessment**

This is often overlooked but can make a significant difference in the process and collective experience of the group. You will find that meeting ahead of time with each group member is essential to facilitating effective group coaching. If it is possible, before the group begins contact each participant by phone, email or via a participant form to begin the coaching alliance, identify and obtain agreement around any “non-negotiable” group rules (e.g., confidentiality) and address and allay any fears or misconceptions. You want to know:

- Why they are enrolling for this group
- What they want to get out of it
- If they are really looking for a class versus a group – this may take a little additional inquiry to identify the kind of experience they hope to have and whether it focuses mainly on identifying and reaching goals in an interactive experience or mostly through didactic learning
- What are the key challenges they are facing
- Do they have any special needs
- How do they best learn
- Anything special they want you to know

The pre-meeting is also very important to identify anything that you feel would disqualify this person from the group and allow you to facilitate a referral if needed. An ounce of prevention is worth a pound of cure!

## **Pre-Group Assessments/Tools and Inventories/HRAs**

You may determine that using a pre-group assessment of some kind would facilitate the group's effectiveness and give it a head start. Whether this is a good strategy and practicable will depend upon such things as the focus of your group, your audience and their willingness to take an assessment; any related costs and the timing and logistics involved. It is also dependent upon the type of assessment you would like to use. Simple assessments can be easily delivered and may not require much time to complete. However your audience may require your assistance and time for questions and answers even with a simple assessment tool.

In an organization or Wellness Program where an HRA and/or biometric screening and follow-up are offered, one or both may be of significant value and in fact drive the measurable outcomes for the group participants. However they too require time and planning before the group begins. Participants should always have the opportunity to meet with someone who will explain the results of the HRA properly.

### **1. Examples of Simple Assessments:**

- Readiness for Change Tool
- Well Life Vision Tool
- Values Clarification Tool
- Wheel of life (etc.)
- Personal Style tools

### **2. Examples of Complex Assessments:**

- Wellness Inventory
- HRA (Health Risk Assessment)
- Biometric Measures (A1C, Blood Pressure, BMI, weight) that are taken by a medical provider, physical therapist or other health care provider who is following or will follow the participant at least through the course of the group.

## **In-Group Exploration & Assessment**

There are many opportunities for assessment and exploration during the course of the group. We can facilitate opportunities for learning and discovery through interactive exercises, writing/drawing, group discussion and laser coaching. Introducing an assessment tool during the group that participants can use individually or collaboratively can be fun and interesting while promoting discovery. The subject matter or purpose of an assessment tool (e.g., creating a well life vision, identifying an area of focus) may in fact be the focus of the group.

We want to facilitate exploration of challenges and barriers, the gremlin voice, where our clients have been and where they are going! We want to forward the action for each participant and for the group as a whole, dynamic, developing, living unit. The coach uses coaching skills but the



rule of thumb for direct coach interaction is the 80/20 rule – 80% group and 20% coach. Here less (of the coach interaction) is more! Encourage them to speak directly to each other instead of ‘going through’ the facilitator. Facilitate group participants to speak directly to one another, ask questions, help each other strategize, and challenge one another too in the service of stepping up to what they want to create. As group participants feel more included, safe and comfortable with the group structure and format they will interact more. Group activities that have participants pair off will also facilitate more acquaintance and interaction. One of the wonderful features of group process is that the discovery process for one individual often has a domino effect within the group. It is interesting to see how often individuals who come together in a particular group share core issues and concerns. As the group evolves it often appears that these particular individuals did not come together by accident – even if they did not know each other before the group!

### **Assessment & Exploration in between Sessions**

Much of the work of the group is done outside the group ‘in-between’ sessions. Exploration here may include actions steps and/or a takeaway inquiry. Whatever the participants commit to do in between group sessions furthers discovery. Using buddies can promote a triple hitter: support, discovery and accountability. The ‘in between’ is also an interesting area to explore the possibility of using assessments and exploratory tools.

### **Considerations for Using Assessment & Discovery Tools**

Whether you are considering using an assessment tool before the group begins or during it, or using exploratory tools during or ‘in between’ sessions, you want to look at both their relevance and practicality. Some questions to consider include:

- What is the purpose of this tool?
- How will it support discovery?
- Does it work in service of the group focus/intention?
- How will the group audience receive it?
- How will the organization view it (as applicable)?
- Is an HRA available through the organization and is there an opportunity for the participant to meet with someone who can explain the HRA results?
- Will participants have access to periodic biometric screening (as applicable)?
- Based on the overall length of the group program, will a pre-group assessment and a post group re-assessment have any meaning?
- What are the accessibility and logistics concerns around implementing any assessment or discovery tool?

## Personal Wellness Map or Plan

### 1. Well Life Vision

Creating the well life vision can be something that is the focus or theme of the group or a tool that is used before, during or in the “in-between” to create a solid foundation for action. There are numerous tools in the **Real Balance Tool Kit** and in the ***Paths of Wellness Guided Journal***, and other resources that can be incorporated to accomplish creating the well life vision.

Having a *Well Life Vision* provides the ‘anchor’ for the Wellness Map or Plan. It identifies the real motivation to get started and to keep going when ‘the going gets tough’. The vision is at once the bridge to the plan and the source of energy that keeps clients going. We want it to be something that is compelling and permeates what they do along their wellness path. When they ‘hit the wall’ – it is easy to forget and ask “why am I doing this anyway?” The *Well Life Vision* is one very specific thing that the group can call upon and refer to, in order to help one another through challenges.

The *Well Life Vision* is the foundation for the Wellness Map or Plan and reciprocally the plan supports and provides a concrete structure to arrive at and to live that vision. Group process and discussion can facilitate identification of the vision as well as a plan that is truly achievable, while building connection and support in the group.

### 2. Areas of Focus & Goals

Like the well life vision, identification of the area(s) of focus and related goals may be the focus or theme of the group or participants may come into the group with one or two areas of focus and related goals. If they are defined through group process, the coach has an opportunity to facilitate the development of **SMART** or **MAP** goals and action steps. If group members arrive in the group with pre-defined Areas of Focus and goals, it is important to take some time to review them with the group members to ensure that they are specific, clearly defined, relevant to the group focus, truly actionable, do not require the participation of other people in order to be successful, compelling, and that goals and action steps are not used interchangeably. It is important to explore and to ensure that whatever participants select, they fit the SMART or MAP model. In fact using SMART or MAP can be turned into an interactive exercise or exploratory tool!

**S** Simple

**M** Measurable

**A** Attainable

**R** Relevant

**T** Time Related

**M** Measurable

**A** Attainable

**P** Passionate

### 3. Action Steps

No matter how the group is designed, identifying and committing to taking some kind of action in between sessions is critical to coaching. The action step can be in service of a stage of readiness, defining vision, defining an area of focus or a goal, or it can be steps related to already defined goals.

**The coach requests action** before the end of every session from every participant. **Coach as facilitator stays on task** and manages time so that action steps can be identified and a commitment to take the action is made.

### 4. Tracking

We know from behavioral psychology and neuro-science that tracking is a critical part of making lifestyle change. Group process can facilitate awareness of the value of tracking and become a source of accountability for tracking. Group members can also be a resource for one another by sharing what types of tracking tools participants are using or have tried, and what has or has not worked for them. Tracking should be built into homework and tied to action steps for groups or participants who are in the *Action* stage of *Readiness for Change*.

### 5. Accountability & Support

The group is a source of both support and accountability. Participants share a common identity as a member of the group with uniting concerns, desires, focus and purpose and where ‘one for all and all for one’ develops organically. This sense of identity also inspires a sense of belonging to something bigger than oneself and accountability to the group for the sake of the group itself. Support is the natural evolution of feeling ‘a part of’ the others in the group and sharing common goals and/or intention.

- **Establishing Accountability**

It’s the facilitator’s role to define with the participants what accountability looks like in the group and to ensure that it is built in to the process. This is best to establish in the very beginning. It may change and evolve over time as the group matures and participants learn how to use one another and the group effectively. It’s the facilitator’s role to ensure that time for accountability is built in (e.g., check-in at the beginning of each session). It may also take the form of checking in with buddies in between sessions.

- **Building Support**

As the group forms, participants begin to lean in more to help and support one another. Similar to one-on-one coaching you want the participants to organically create a support structure for when the group ends. This may be explored as part of group process or as it applies to accomplishing action steps and/or planning for the end of the group.

**The group's support may show up in many ways including:**

- Sharing “how to” ideas to accomplish goals
- Strategizing around dealing with external or internal obstacles
- Calling each other on excuses and/or not showing up fully in the group
- Challenging each other to reach higher
- Empathy
- Developing buddy relationships outside the group

**As the group evolves the coach needs to watch for:**

- Collusion among members
- The *gremlin* taking over the group
- Aggressive or disrespectful interaction
- Victimization
- Tangents
- ‘Suggestion tennis’ and endless problem solving

**To counter the negative effects use both coaching and facilitation skills including:**

- Saying what is going on (naming it)
- Respectful interruption
- Restatement of the group agreements
- What are other ideas?

**Ongoing Evaluation**

Evaluation provides feedback. It asks “Are we on the right path?” and “How are we doing?” Group participants evaluate their own progress and use it to revise their plan and next steps. Group participants, coach/facilitator evaluate how the overall group is doing.

- **Evaluation for the Participants**

Measurement Instruments used before and/or during and after the group can give group participants a sense of their own progress along the continuum. Formal tracking or informal means such as a “check-in” provide evaluative information. With the information from evaluation the participants and coach can see what has been accomplished, and what remains. It is therefore very important that participants are satisfied with their indicators of success. Identifying those indicators should be established up-front before the group begins or at the beginning of the group. This may be something participants define as a part of group process.

- **Evaluation for the Group**

We want to evaluate how well the group delivers what it purported to do, and what are contributing factors to its efficacy or shortcomings. If this is a longer term group (6 weeks or more), you want to build in periodic evaluations along the way to look at what is working, what is not working and to assess any changes the members want to

incorporate. Periodic evaluations may also help the participants to identify how to use the group more effectively or efficiently and how to lean into the group more. It should look at both in-group and 'in-between' time to evaluate how either should be adjusted or not.

When the group ends it is very helpful to use an evaluation survey. The survey should map back to the group goals that were established at the beginning and provide the ability for participants to assess how well they were met. The evaluation should take into consideration the entire landscape of the group – what worked and what did not – what participants would like more of and less of. Group evaluation should also include a focus on how effective the group was in supporting the participants to meet their own goals.

### **Measurable Outcomes**

Positive outcomes are the result of goals successfully met or in the process of being met. For an outcome to be quantifiably measurable it must be very specific and in a category that can be quantifiably measure (e.g., A1c, LDL, weight). Soft measurements are specific but arrived at by personal experience or self-review. Whether measurable by hard data or soft personal assessment, an outcome contains all three of the following elements:

- Identification of what needs to change
- Identification of how the client will know that it has changed
- Identification of the conditions in which the change is to be demonstrated

### **Outcomes for the Client**

Group Participants needs to know when they have arrived at their destination! Outcomes reinforce progress. This is time to celebrate and/or move on to new challenges. At the end of the group you want to build in a process to acknowledge progress individually and collectively and what next steps are for each participant.

### **Outcomes for the Coach**

The Coach/facilitator needs to know that their group design and process has been effective. Client success is very reinforcing for the coach. Nothing helps a coach improve like a combination of participant feedback and concrete measurable evidence.

### **Outcomes for Third Parties**

When third parties are involved they often require aggregate data about the effectiveness of their wellness group coaching program or the values of group coaching as a component of their wellness program. What's working? What needs to be improved? Success data can be used to make the case for more wellness coaching in a wellness program.

## What to Evaluate Overall

What exactly do you measure and evaluate? Your choices will depend on the goals and needs of the ‘group’ and of the individual participants.

### Baseline Data

To know when your intervention or program has made an impact on the client you’ve got to have “before” data to compare to the data after your intervention.

Health Risk Appraisals. HRAs are health questionnaires that may contain from 15 to 50 questions which clients/patients answer about their health habits and histories. HRAs should be done annually so you can track the health of your employee group, and alert individuals to their health risks. Often companies and medical practices use these and they can be used as a baseline for evaluation.

Lifestyle Change and goal accomplishment are solid usable data and useful to track.

Self-Perception data from the client is useful. An Increase in wellbeing or a reduction in feeling of stress tells us that the client’s lifestyle changes are having impact on their overall health and ability to cope in life.



## Common Targets of Evaluation in Wellness Coaching

### Absenteeism/Presenteeism

- Reduction in absenteeism due to illness.
- Increase in Presenteeism when at work.

### Knowledge and Skills

- Before and after data can demonstrate that participants learned or developed skills as a result of your work with them.
- Reduction of Risk Factors & Biometrics.
- If you implement a comprehensive program aimed at reducing specific risk factors among employees, an HRA (or a specific questionnaire) could show that you succeeded. Example: weight reduction, increase in exercise or reduction in cholesterol readings.

### Changes in Behavior and Lifestyle

What was client/patient doing before and how has this changed. Often this is related to behaviors that have been related to medical risk factors.

### Participant Satisfaction

Participant evaluations indicate client satisfaction in their own progress.

### **Participation Rates**

The number and percentage of clients who participate can demonstrate employee interest and how well your program is being promoted and supported. You can also set “Increased Participation” in existing company wellness efforts as a goal.

### **Effects on Corporate Costs**

Broader goals of health promotion programs may include helping to contain or even reduce costs. These goals usually take a longer time to impact.

### **Absenteeism Rates/ Workers Compensation Claims**

Happy, healthy workers who are informed about self-care are absent less often. Programs that help provide emergency child and elder care can be evaluated by their effect on absenteeism, too. Safety is an important component of health promotion, and successful interventions can reduce injuries and disability claims significantly.

### **Productivity**

Many health interventions address causes of “presenteeism” (employees who are present in body but aren’t productive). Depression, stress, financial and health problems are all known to decrease productivity. Effective programs may positively impact Productivity.

## **Homework for Chapter 8**

**Third Collaborative Session Work** - Use your buddy to brainstorm or get feedback on integrating experiential learning, integrating educational segments or integrating the Real Balance Methodology.





## ***Chapter 9***

# **The Real Balance Guided Journal Model**

### **Key Concepts**

- The WM 360° GO Guide—The Model Made Easy

### **Connections for the Client**

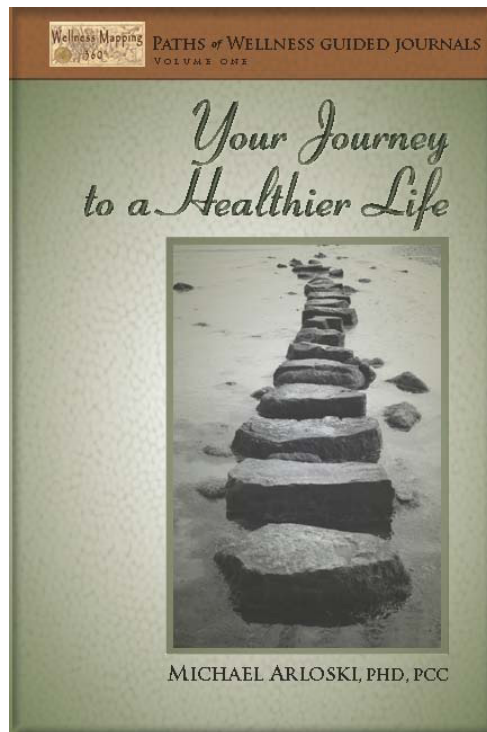
- The Guide - easy reference
- Autonomy—empowerment
- Group support

### **Applications**

- Easy application to employment or medical settings

## The Model Made Easy - Your Journey to a Healthier Life, Paths of Wellness Guided Journal

The Real Balance Guided Journal can provide an easy and effective approach to group coaching. *The Your Journey to a Healthier Life, Paths of Wellness Guided Journal* — the Guided Journal has a 12-session Plan.



## **Overview**

### **Opening Session**

This is the first session and should be used to address concerns, group guidelines, purpose of the group, and to define how the group will operate. Give participants the Wellness Journals and have people commit to Buddy Coach.

### **Session 2: Exploration**

- Curiosity—Reflection
- Asking the questions—reflecting on your life and health

### **Session 3: Assessment**

- Reflection—Insight
- Dig down and see where you are—formal and informal assessments

### **Session 4: Vision — Foresight — Courage**

- Create your Well Life Vision

### **Session 5: MAP Session1 (Measurable—Attainable—Passionate)**

- What has to change?
- What are you ready to address?

### **Session 6: MAP Session 2 (Measurable—Attainable—Passionate)**

- Creating the Steps to Reach Lifestyle Goals

### **Session 7: Inspiration — Motivation — Connection**

- Support Systems

### **Session 8: Re-Create—Re-Frame—Re-New**

- Gremlin Fighting/Positive Self Talk

### **Session 9: Center—Balance—Harmonize**

- Change, Stress, Self-care

### **Session10: Replenish-Rejuvenate -Restore**

- Quiet, rest, awareness

### **Session 11: Evaluate—Maintain—Celebrate**

- Plan for maintenance—celebrate successes

### **Session 12: Closing Session**

This is the last session in the 12-session Wellness Coaching group using the Wellness Guide. In this session you will want to assure that participants are connected to other organizations, services, groups. You will want to encourage informal connection among the group participants once the group ends and most of all you want to celebrate! The Guided Journal — 12-session Plan

## Using the Plan

### Session 1: Opening Session

Facilitator(s): \_\_\_\_\_

Date of Session: \_\_\_\_\_ Time: \_\_\_\_\_

This is the first session and should be used to address concerns, group guidelines, purpose of the group, and to define how the group will operate. Give participants the Your Journey to a Healthier Life, Paths of Wellness Guided Journal and have people pair with a Buddy Coach.

**Purpose:** For the group participants to get to know one another, develop guidelines for the group, and understand the wellness coach process.

**Materials Needed:** A flipchart or wipe board with markers and wellness guides for each participant.

**Opening Activity:** Choose an activity or check-in method that allows each group member get to know others in the group.

**Check in:** What are each participant's hopes and fears for the wellness coach group?

#### Topics:

- Develop group guidelines/ground rules.
- Facilitate what is OK and what is not OK in the group. Write it all down and post in each meeting.
- Review the Wellness Guide and how it will be used in the group.
  - Give out Wellness Guides and read and work the Introduction part of the Wellness Guide. Talk about working the Wellness Guide and journaling.
- Review how the wellness coaching group sessions will operate
  - Buddy coaching
  - Wellness guide
  - Journaling
  - Wellness coach group sessions
- Set up Buddies for buddy coaching—talk about purpose and expectations of “buddy coaching.” Educational/ Informational needs: (Keep separate from group process.)

#### For Next Session:

- Guided Journal: Read “Exploration” and answer questions on pages 17-23.
- Buddy Coach Session: Get to know each other—set up weekly meetings.
- Journal.

#### Close the Session:

Review and recap

## Session 2: Exploration — Curiosity — Reflection

Facilitator(s): \_\_\_\_\_

Date of Session: \_\_\_\_\_ Time: \_\_\_\_\_

Asking the questions — reflecting on your life and health

### **Purpose:**

To assist group members explore how they see themselves and what they would like from wellness coaching.

### **Materials Needed:**

A flipchart or wipe board with markers and wellness guides for each participant.

### **Opening Activity:**

Choose an activity or check-in method that allows each group member to get to know others in the group and builds trust.

### **Check in:**

How did the buddy coaching go? Answer questions participants might have. Talk about journaling.

### **Facilitate Group Process Around These Topics:**

Review the Wellness Guide chapter on exploration. Ask the powerful questions posed in the chapter.

### **Educational/Informational Needs:**

(Keep separate from the coach group.)

### **For Next Session:**

Guided Journal: Complete “Assessment” on pages 29-35 and complete the “Wheel of Life.”

### **Buddy Coach Session:**

- Review the “Wheel of Life” with your Buddy.
- Journal

### **Close the Session:**

Review and recap

### **Session 3: Assessment—Elicitation—Insight**

Facilitator(s): \_\_\_\_\_

Date of Session: \_\_\_\_\_ Time: \_\_\_\_\_

Dig down and see where you are — formal and informal assessments

#### **Purpose:**

Group members will self-assess how the different areas of their lives are working.

#### **Materials Needed:**

A flipchart or wipe board with markers and wellness guides for each participant.

#### **Opening Activity:**

Choose an activity or check in method that allows each group member to get to know others in the group.

#### **Check in:**

How did group members' week go? Did buddies meet? Members have an opportunity to report back concerning agreements made the week before.

#### **Facilitate group process around these topics:**

- Put up a large "Wheel of Life" and ask each group member to speak to their own experience with the assessment tool
- How does the "Wheel of Life" relate to their health?

#### **Educational/Informational needs:**

(Keep separate from the coach group.)

#### **For Next Session:**

- Guided Journal: Read "Visioning" and answer questions on pages 41-49
- Buddy Coach Session: Talk with your buddy about your Well Life Vision
- Journal

#### **Close the Session:**

Review and recap

## Session 4: Vision — Foresight — Courage

Facilitator(s): \_\_\_\_\_

Date of Session: \_\_\_\_\_ Time: \_\_\_\_\_

Create your Well Life Vision

### Purpose:

Each group member will create their personal Well Life Vision.

### Materials Needed:

A flipchart or wipe board with markers and wellness guides for each participant.

### Opening Activity:

Choose an activity or check in method that allows each group member to get to know others in the group.

### Check in:

- How did group members' week go?
- Did buddies meet?
- Members have an opportunity to report back concerning agreements made the week before.

### Facilitate group process around these topics:

- Show examples of Well Life Visions
- Ask powerful questions that guide the process
- Each group member will write their personal Wellness Life Vision

### Educational/Informational needs:

(Keep separate from the coach group.)

### For Next Session:

- Guided Journal: Read the "Measurable" section and begin the MAP process — complete pages 55-61.
- Buddy Coach Session—Talk over what needs to change in your life for your Well Life Vision to become a reality.
- Journal

### Close the Session:

Review and recap

## Session 5: MAP Session 1

Facilitator(s): \_\_\_\_\_

Date of Session: \_\_\_\_\_ Time: \_\_\_\_\_

Measurable—Attainable—Passionate

- What has to change?
- What are you ready to address?

### Purpose:

Mapping the course of change.

### Materials Needed:

A flipchart or wipe board with markers and wellness guides for each participant.

### Opening Activity:

Choose an activity or check-in method that allows each group member get to know others in the group.

### Check in:

Members have an opportunity to report back concerning explorations and agreements made the week before.

### Facilitate group process around these topics:

Group members have developed a Well Life Vision and now it is time to determine where you want to focus your efforts.

- Determining area of focus and readiness for change.
- Determine steps needed to create the bridge of change

M — Measurable

A — Attainable

P — Passionate

### Educational/Informational needs:

(Keep separate from the coach group.)

### For Next Session:

- Guided Journal: Read “Measurable” and complete pages 62-66
- Buddy Coach Session: Explore the MAP with your buddy
- Journal.

### Close the Session:

Review and recap



## Session 6: MAP Session 2

Facilitator(s): \_\_\_\_\_

Date of Session: \_\_\_\_\_ Time: \_\_\_\_\_

Measurable—Attainable—Passionate

Creating the Steps to Reach Lifestyle Goals.

### **Purpose:**

Mapping the course of change.

### **Materials Needed:**

A flipchart or wipe board with markers and wellness guides for each participant.

### **Opening Activity:**

Choose an activity or check-in method that allows each group member get to know others in the group.

### **Check in:**

Members have an opportunity to report back concerning agreements made the week before.

### **Facilitate group process around these topics:**

- Determine sources of support
- Plot the MAP in the Form
- The Power of tracking

### **Educational/Informational needs:**

(Keep separate from the coach group)

### **For Next Session:**

- Guided Journal: Read “Motivation” and answer questions on pages 7-79.
- Buddy Coach Session: Talk about what is motivating you with your buddy.
- Journal.

### **Close the Session:**

Review and recap

## Session 7: Inspiration — Motivation — Connection

Facilitator(s): \_\_\_\_\_

Date of Session: \_\_\_\_\_ Time: \_\_\_\_\_

Support Systems

### Purpose:

To explore what motivates each of us and to support group members understanding of their own motivation.

### Materials Needed:

A flipchart or wipe board with markers and wellness guides for each participant.

### Opening Activity:

Choose an activity or check-in method that allows each group member to get to know others in the group.

### Check in:

- How is the Wellness Map working?
- Members have an opportunity to report back concerning agreements made the week before.

### Facilitate group process around these topics:

- Sources of motivation
- Needs for and sources of support
- Familial and cultural influences
- Who supports and who does not?

### Educational/Informational needs:

(Keep separate from the coach group)

### For Next Session:

- Guided Journal: Read “Re-frame” and complete pages 85-93
- Buddy Coach Session: Keep working the plan together—talk about Gremlin talk
- Journal.

### Close the Session:

Review and recap

## Session 8: Re-Create—Re-Frame—Re-New

Facilitator(s): \_\_\_\_\_

Date of Session: \_\_\_\_\_ Time: \_\_\_\_\_

Gremlin Fighting / Positive Self Talk

### Purpose:

Group members will learn about the Power of Habit and the Power of Positive Thinking.

### Materials Needed:

A flipchart or wipe board with markers and wellness guides for each participant.

### Opening Activity:

Choose an activity or check-in method that allows each group member to get to know others in the group.

### Check in:

Members have an opportunity to explore their Wellness Map and accountability and support needs.

### Facilitate group process around these topics:

- What we know about Habit
- Gremlin fighting
- Changing negative thoughts to positive
- Explore what triggers your gremlin

### Educational/Informational needs:

(Keep separate from the coach group.)

### For Next Session:

- Guided Journal: Read “Center” and complete pages 99-113
- Buddy Coach Session: Explore how you respond to change with your buddy
- Journal

### Close the Session:

Review and recap

## Session 9: Center—Balance—Harmonize

Facilitator(s): \_\_\_\_\_

Date of Session: \_\_\_\_\_ Time: \_\_\_\_\_

Change, Stress, Self-Care

### Purpose:

Understanding our response to change and positive ways to address stress.

### Materials Needed:

A flipchart or wipe board with markers and wellness guides for each participant.

### Opening Activity:

Choose an activity or check in method that allows each group member get to know others in the group.

### Check in:

Members have an opportunity to explore their Wellness Map and accountability and support needs.

### Facilitate group process around these topics:

- All about change
- Stress thrivers
- Self-care and self-permission

### Educational/Informational needs:

(Keep separate from the coach group.)

### For Next Session:

- Guided Journal: Read “Replenish” and complete pages 119-128
- Buddy Coach Session: Talk about how you take care of yourself
- Journal

### Close the Session:

Review and recap

## **Session 10: Replenish — Rejuvenate — Restore**

Facilitator(s): \_\_\_\_\_

Date of Session: \_\_\_\_\_ Time: \_\_\_\_\_

Quiet, rest, awareness

### **Purpose:**

To explore mind/body balance.

### **Materials Needed:**

A flipchart or wipe board with markers and wellness guides for each participant.

### **Opening Activity:**

Choose an activity or check in method that allows each group member get to know others in the group.

### **Check in:**

- Members have an opportunity to explore their Wellness Map and accountability and support needs.
- What has been going well and what has been difficult?

### **Facilitate group process around these topics:**

- How to achieve balance
- The purpose of quiet or doing nothing

### **Educational/Informational needs:**

(Keep separate from the coach group.)

### **For Next Session:**

- Guided Journal: Read “Evaluate” and complete pages 135-145
- Buddy Coach Session: Talk about the changes you are seeing and the challenges you have
- Journal

### **Close the Session:**

Review and recap

## Session 11: Evaluate—Maintain—Celebrate

Facilitator(s): \_\_\_\_\_

Date of Session: \_\_\_\_\_ Time: \_\_\_\_\_

Plan for maintenance — celebrate successes

### Purpose:

To know when you have achieved your goals and alter your plan when you are not getting the outcomes you desire.

### Materials Needed:

A flipchart or wipe board with markers and wellness guides for each participant.

### Opening Activity:

Choose an activity or check in method that allows each group member to get to know others in the group.

### Checking in:

- How has the tracking been working for you? Are you seeing the changes you had hoped for?
- What type of accountability or support could you use from the group?

### Facilitate group process around these topics:

- Strategize when the plan is challenging to complete and you do not follow through.
- Who can support your continued Well Life Vision?
- How will you reward yourself?
- What is next?

### Educational/Informational needs:

(Keep separate from the coach group.)

### For Next Session:

- Guided Journal: redo the “Wheel of Life” and complete at least one other “Wheel” in the last section of the Wellness Guide.
- Buddy Coach Session: Explore what is next and how to keep the Well Life Vision growing? Reference the “Wheels”
- Journal—continue to journal

### Close the Session:

Review and recap

## Session 12: Closing Session

Facilitator(s): \_\_\_\_\_

Date of Session: \_\_\_\_\_ Time: \_\_\_\_\_

This is the last session in the 12-session Wellness Coaching group using the Wellness Guide. In this session you will want to assure that participants are connected to other organizations, services, groups.

You will want to encourage informal connection among the group participants once the group ends and most of all you want to celebrate!

### **Purpose:**

To close the group and determine continued support for the Well Life Vision and lifestyle

### **Materials Needed:**

Food and Fun!

### **Opening Activity:**

Choose an activity or check-in method that allows each group member to express how they feel about the group ending, their experience with wellness coaching and the changes they have made.

### **Check in:**

Members have an opportunity to explore their feelings about the wellness coach process, the ending group and their hope and desires for the future.

### **Facilitate group process around these topics:**

- Exchange of numbers
- Continue buddy coaching
- Celebration

### **Close the Session:**

- Review and recap
- Give certificates of completion!

## WM360° Group Session Planning Form

Facilitator(s): \_\_\_\_\_

Date of Session: \_\_\_\_\_ Time of Session: \_\_\_\_\_

Location: \_\_\_\_\_

Session #: \_\_\_\_\_ Wellness Guide Section: \_\_\_\_\_

### Materials Needed:

Be prepared and use visuals whenever possible.

### Group Assistance:

Engage the group — ask the group to rotate a time keeper and scribe position.

### Open the Session:

Choose an activity that both enlivens the group and grounds it in the group process.

### Checking in:

- Each member makes a brief statement including:
  1. Any “wins” for the week
  2. Report on any agreements they made with the group at the last meeting (accountability)
  3. Any support needs they have from the group
- Review the past week’s sections in the Guided Journal
  - What’s been learned?
  - Did each Buddy meet?
  - Go over the Guided Journal(decide what parts of each chapter to address in the group)
    - Explore with the group what is working well?
    - What is challenging?

### Facilitate group process around these topics:

- Topics to be explored or addressed in the session
- Remember that the group is a “coach group” and not a class.
- Keep the Coaching Mindset and don’t fall into “educate and implore”

### Information/Education/Speaker:

Education, research, and speakers can be brought into the group about specific topics but needs to be kept separate from the “wellness coach group process.” When information is needed or requested by the group members — empower them to share in the gathering and presenting.



Briefly go over the next chapter in the Guided Journal

- Talk about upcoming work and what to accomplish alone and what to talk over as buddies
- Clarify any new agreements-for action or for preparation
- Reinforce any re-commitments to previous agreements

**Close the Session:**

In many cases a consistent way of closing the group is helpful and comforting to group members. It can be used and feel like a “Hurrah” as members go out on their own.

Comments:

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**Homework for Chapter 9**

Choose a Section of the Guided Journal and develop your own wellness group plan for that week.

Consider:

- Your coach group specialty
- Other education or speakers you would bring in
- The length of your group



## ***Chapter 10***

# **Challenging Situations Self-Management Best Practices**

### **Key Concepts**

- Dealing with challenges that arise in the group
- Self-management in group process
- Collaborating with a Co-Lead
- Applying *Best Practices*

### **Connections to Be Made for the Group**

- Being prepared for the unexpected and turning challenges into learning for all

### **Applications**

- Effectively heading off or working through difficult situations
- Self-responsibility as coach
- Self-care as professional
- Keeping best practices in mind

## Dealing with Challenges

As a group leader you need to be mentally prepared for the unexpected. People bring their style, thoughts, beliefs, feelings and behaviors into the group with them. Sometimes style, habits and feelings can manifest in a way that causes disruption and/or interference with group process or may derail it altogether if unchecked. Success strategies begin with yourself.

### 1. As a Human Being:

Self-awareness is your best defense against being thrown way off balance. Knowing your style and what kinds of things can throw you off track and unsettle you is very important. You may not be able to change your knee-jerk or gut level reactions to those things, but awareness that you are having a reaction and knowing that it is simply “that thing you do” can allow you to avoid a ‘fight flight or freeze’ (stress) reaction and help you maintain or regain your coach/facilitator self.

### 2. As Coach:

- Remember that people are so much more than their thoughts, beliefs, feelings and habits. Each one is *naturally creative resourceful and whole*; a hero on their journey with a wellspring of inner wisdom
- Let go of attachment to outcome for any one person in the group or the group as a whole.

### 3. As Facilitator:

- Remember that it is your responsibility to get things back on track and to help participants shift behaviors that do not serve them or the group
- Keep in mind that just because the situation feels challenging, it is not necessarily the intention of a participant to be challenging – they may be totally unaware of what they are creating
- Think of every challenging situation as a great learning opportunity

## Dealing Effectively with Common Types of Challenges

### Conflict in the Group

Remember that conflict is normal. For participants to challenge ideas, group structure and processes, is all part of the “Control” or “Storming” processes discussed in Chapter 2.

### Examples of Working with ‘Normal’ Conflict

- Acknowledge their point of view and work it through: “So Joe and Sam you have 2 different perspectives on this. What do see as the best way to move forward from here?”
- Stick with the program: “We are getting off on a tangent, let’s get back to our focus”

- Insist that the group stay focused on the agreed-upon purpose of the group and on a coaching style of interaction and processing. Reminding people of their agreements regarding respectful interaction may be helpful: “This is a hot topic and let’s remember the agreements we all made about respectful interaction.”
- Don’t let the coaching group “deteriorate” into a quasi-therapy group. This is wellness coaching, so even though it may be a stretch at times, stay focused on lifestyle improvement: “We’re moving into the realm of therapy. Let’s get back to .....

### Help Difficult Clients “Save Face”

An ounce of prevention is worth a pound of cure. Interviewing group candidates prior to the beginning of the group is extremely helpful in identifying and excluding inappropriate individuals up front. However, it may not always be possible to interview your candidates ahead of time or the difficulties may not surface until after the group has begun. When a client seems like a poor fit for the group because they are:

- Disruptive or constantly displaying criticism or negativity towards other group members or towards the group process and structure;
- Continuously challenging the leader;
- Continuously “one-upping” rather than connecting (e.g., my problem is bigger than your problem – top dog); talk to them privately. Discuss how the conflict can be resolved or share your observations of their behavior. They may not realize what they are doing and creating awareness may elicit a change or an opportunity for self-discovery. You may also need to explore possible referral to some other group or means of getting help. Reserve the right to eject anyone from the group rather than bring down the rest of the membership. Refund any fees completely and keep very good notes of the whole process.

If you are working for a third party, before you begin the group you want to identify the possibility of ejecting a difficult participant and create agreement around how it will be handled including issues related to reimbursement.

P.S. this is an exceedingly rare (if ever) occurrence.

### Dealing with the “Chatty Cathy” or the “Know It All” – Over share

The *Chatty Cathy*: Sometimes a group member may unknowingly dominate the group conversation by either taking extra-long to share their own process, or by turning the spotlight back on themselves, no matter who else is talking.

The *Know It All* is different than the *Chatty Cathy* in that they will interrupt or attempt to take over quite deliberately. The *know it all* wants to tell other group members what they should do and how to do it. They may present themselves as *the* authority (on anything). They may also

feel that they know more than the coach/facilitator.

Long before a private conversation with the talkative group member you can steer them toward being more focused and succinct by using laser coaching skills.

### **Examples of Dealing with *Chatty Cathy***

- Refocus Cathy: “So Cathy, can you tell us how that relates to your goal of getting more sleep?”
- Maintain focus on the participant who is sharing and off the interrupter: Carlos is talking and suddenly Ellen interrupts and takes over with her story. Simply do not acknowledge or look at Ellen and continue to look intently at Carlos. Simple, yet amazingly effective!
- Request the interrupter to switch focus to the individuals sharing: Ellen continues to bring the conversation back to her. Ask her to tell Carlos how that relates to his experience.

### **Examples of Dealing with the *Know It All***

- Acknowledge Susan and engage the group: “So Susan, you have some good suggestions. Ask the group: “what are some other thoughts on this?” “How about someone we haven’t heard from.”
- Request Sam to hold-off and create way to ‘save face’: “Sam, you have a lot of ideas about that, would you be willing to hold those thoughts until the end of the group and then we could talk about them?” Often there is not a need to speak at the end.

## **Dealing with the “Yes But” – Participants Who Present Problems but Don’t Accept Solutions**

This client listens to suggestions from the group and always finds a reason why the suggestion will not work. Sometimes participants will respond to the challenge by trying harder to offer solutions or they will simply become stymied and stop. It’s not always clear why the client is “yes butting.” There may be real external barriers, the client may be genuinely stuck and doesn’t realize it or there may be an internal barrier that has not been surfaced. What is clear is that going down the same path will only result in the same results which can be frustrating to both the group and the coach(s). In this case use laser coaching and powerful question(s) to shift the focus away from suggestions to the client.

### **Examples of Powerful Questions to Deal with “yes but”**

- What’s in the way for you right now?
- What are willing to do right now?
- Where do you hold back?
- Where are you limiting yourself?
- Where are you holding back right now?
- Is this the gremlin speaking?
- What’s the price you are paying for “yes but”?

## Dealing with Charged Emotional Expression

This participant may have the same impact as the *Chatty Cathy* in that their emotional response may draw the spot light to them and keep it there. Strong emotions may create discomfort for the group or a reaction to “comfort and fix”. Having emotions is normal. Occasional strong expression of emotion in the form of frustration, anger, fear or sadness sometimes with tears may in fact be extremely facilitative for the group.

### Examples of Dealing with Strong Emotion

- Acknowledge the feeling and request what is needed or wanted: “Leslie, this is a really scary time, how can the group support you?”
- Build connectedness and deepen the learning by stating the common theme or feeling in the group. Sometimes one person expresses a feeling that is shared by other participants but has not been named. “It sounds like Susan is speaking for the group” or “I see that many of you share what Susan is expressing.”
- Allow the feeling to land by using silence or requesting silence: “Let’s just be with this for moment - and breath.”
- Draw reflection from the group: “What do you notice?”

### Examples to Prevent “Fixing the Participant”

- Create spaciousness for the group, focus on the individual and tap into their own wisdom: “Tom, this is a really difficult time, how can the group support you?” or “What’s important for you right now?” or “What do you need to take care of you right now?”
- Allow the individual to respond first and help the group respond to that individual’s request: “How can we support Cindy’s request?”
- Create learning for everyone use a powerful question to the group: “what is everyone noticing about yourselves right now?” “What’s your take-away from this?”

As in the case with conflict in the group, don’t let the coaching group deteriorate into a quasi-therapy group. Determine if laser coaching is appropriate.

## Dealing with Continuous Charged Emotions

If a participant seems stuck in a strong feeling state and/or continually emotionally charged, does not seem to be able to move forward and it is interfering with group process use the “save face” approach above.

## Dealing with an Uncomfortable or Inappropriate Topic

The facilitator must assess whether a topic is truly inappropriate or uncomfortable to discuss. Determining if the topic is inappropriate is usually very straight forward as when the topic goes completely off course from lifestyle change. It can be less clear when sensitive topics emerge such as sexual behavior or personal finances (both hot topics). In this case you will need to evaluate the topic vis-à-vis what’s acceptable to the group as a whole and the topic’s relevance to learning, discovery and moving forward. It’s your role to intrude and to keep the group focused

on wellness coaching and the topic at hand if the subject is inappropriate or too uncomfortable. It's OK to state that the topic is not relevant or appropriate in this context.

If the topic is appropriate and uncomfortable point the group towards what is important about this topic for the group, what is the learning for the group, and how can they use it to move forward.

### **Examples of Dealing with an Inappropriate Topic**

- Redirect the group: "We're getting off topic, let's get back to ..... " or "Well this is interesting, and it's not what we are here to talk about. Let's get back to..."

### **Examples of Dealing with an Appropriate but Uncomfortable Topic**

- Name the discomfort: "I hear that this is uncomfortable" and then
- Explore the relevance: "What's the significant of this for you?" or "What's important about that...." and then
- Explore the learning: "What learning are you taking away?"

## **Dealing with Runaway Group**

Even with the best intentions and skill, occasionally a group can become like a runaway train. The only thing to do is to get it back on track. Most often it is very easy to recognize when it has become a runaway group, occasionally however, a very charming or humorous participant may create a more subtle runaway process. In this case the group becomes engaged in humor or getting caught up in the story. In either case the facilitator must bring the group back to center and the wellness focus.

### **1. Examples of Dealing with the Runaway Group**

- Use interruption, name that the group has gotten off course and request that the group refocuses. Use "and" rather than "but": "Ok we've gotten off track – it's so easy to get caught up in Sally's story – **and** let's get back to..."
- Use a powerful question: "What's important for the group right now?"
- Use a structural intervention: very occasionally the energy of a run-away group may take on a strong life of its own and you may need to use something more startling to get their attention and shift the focus. Use of a bell, turning off and on the lights can get their attention. Using humor to name what just happened and re-focus can also help to save face for participants.



## **Dealing with Participants Leaving the Group Early or Joining Late**

When participants leave before the end of the group, a sense of insecurity, fear or sadness may result depending upon the reason for the departure. If the facilitator requests the participant to leave using the “Save Face” approach the group may feel relieved and safer. However if a participant leaves because of a personal reason or escalating health challenge there may be concern and even uncertainty if the health issue is shared by the group.

When participants join the group after the first session especially if it is 2 or 3 sessions along, the new comer can be perceived and treated as ‘the outsider’ and/or it can impact or interrupt the group’s Forming stage. If people are allowed to join in a continuous stream it can prevent the group from Forming. If at all possible close the group after the first session or second session. If you are running a group for an organization that requires an ‘open enrollment’ policy for the first few weeks you will need to make it clear to the group. Sometimes new members will disappear into the woodwork or just the opposite, become aggressive as their way to be recognized and find their position in the group that has already begun to form.

### **1. Examples of Dealing with People Leaving the Group Early**

- Name it as soon as possible via email or in-group: If the departure occurs after the facilitator has “fired” the participant, just name it: “George will not be return to the group.” If the departure is the participant’s choice/decision: “Frank has had to leave the group” or “Frank can you share with the group what you will be doing”
- Request a participant to remain until they have told the group: “John will you come to the next group to share this with the group?”
- Allow the group to say goodbye after the participant lets the group know
- Ask the participant what they are comfortable for you to share with the group and ask their permission to share it if there is not an opportunity for the individual to say it to the group: “Sam what are you comfortable with my sharing with the group?” “Do I have your permission to share that?”
- Allow the group to share any concerns, thoughts or feelings if a participant has left for personal reasons without saying good-bye to the group: “Is there anything anyone would like to say about Susan’s leaving?”

## 2. Examples of Dealing with People Joining Late

- Include the policy of ‘open enrollment’ in the first session ground rules ask people if they are OK with this: “The organization has a policy to allow people to join the group up to X sessions. Is everyone OK with that?”
- When a new member comes in, welcome them, allow them to introduce themselves and verbally agree to the established group agreements: “Susie is joining the group today. Susie please tell us about yourself...” “Susie these are the agreements that the group defined, will you agree to them?”
- If time allows request the other group members to go around and introduce themselves by name: “Will everyone please introduce yourself to Susie by saying your name”
- Use interruption for challenging or alienating behavior or remind people of their agreements.
- Be aware of individuals who ‘disappear’ in the group or are being treated as an outsider and elicit their interaction: “Helen, we haven’t heard from you, what do you see....?”

## Self- Management Challenges

You are a part of the group process and sometimes you can actually take the group off course. The kinds of self-management situations that arise may include the following:

### Coach’s Agenda Becomes an Undercurrent

It can happen. The bottom line is, you are no longer with the group as coach and you need to find your way back. Some clues are:

- Your *gremlin* voice is distracting you. You may feel yourself trapped in self-analysis – defending or judging – or maybe just feeling annoyed with just one or maybe several participants
  - You are caught up in an emotional reaction
  - You are attached to a particular solution or idea for the client. You may be asking questions and the client responds by saying they are not sure what you are looking for from them
  - You are sharing your own personal story way beyond value to the group
  - Letting your own favorite wellness focus or program take over (e.g., the benefits and process of juicing, using a particular form of relaxation Heart Math<sup>®1</sup>).
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## **Your SME Role Takes Over**

Sometimes, especially for new coaches or being new to the group coaching experience, it is easy to fall into the comfort zone of being the subject matter expert. Some clues are:

- Extending the learning periods well beyond 5-7 minutes
- Giving advice instead of asking questions
- Participants are glazing over and speaking less
- The focus has shifted to answering questions specific to your subject matter expertise

## **Bumped off Course**

Staying on track is both the coach and the facilitator role. So many things can get us temporarily off course. Challenging situations, sirens in the street outside, becoming distracted by the content of what is being discussed, having a reservation about a participant's action plan, something someone says suddenly reminds you that you forgot to pay a bill that's now overdue, something someone shares reminds you about a sad conversation with a friend, or maybe you received some bad news just before the group and it's hard to focus on the group. Whatever it is, you are human and periodically things will happen that cause you to focus your attention away from the group.

## **Time Management**

All group coaches are challenged by time management to some degree. For the group to be effective you want to follow a structure, stay on target and allow time for group process. You can't always anticipate challenging situations, problems with access to your group location (e.g., the room is suddenly being used by another group of people) or a change in venue, telephonic or web issues, or a participant arriving with a crisis or serious problem they need to address. However you do want to be sure that you build into your group structure and plan adequate time to accommodate 'check-in' at the beginning and the identification of 'next steps' and the summary or 'wrap-up' at the end of the session. The next steps and summary are the most vulnerable components because they are at the end – but most critical to the forward movement of the group and each individual within the group.

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1 - Heart Math is a biofeedback program. See <http://www.heartmath.org>

## Getting Back on Course

Step one is to recognize that you've gotten off course and refocus. Sometimes it's helpful to make a statement (e.g., "I'm getting off course – let me refocus"). Record it well in your mind and after the session, ask yourself "What is the truth in this for me?" "What is the learning here for me?" The more you can become adept at recognizing your own judgment, emotional reaction, personal attachment to an outcome or action or bringing in your story, the more effective you will become at helping clients deal with their own judgments, reactions and attachments.

If you are working with a co-facilitator, whether a coach or SME and you notice that they are demonstrating one or more of the above clues, you also need to address it with them.

Remember – it's OK to be human – you grow just as your clients do. It's not OK to hide your head in the sand when your own stuff gets in the way of your coaching. Having a coach, coaching supervisor, or mentor can be very helpful. Ways to get yourself back on track include the following:

### Notice It, Name It and Move On!

Most often it's best to admit that you disappeared momentarily. This will actually create trust as long as you don't make a habit out of it. Don't make the mistake of thinking that you can hide your vanishing from the group. Even if they do not articulate it – they are highly likely to sense it. It can become an elephant in the room. Clients will respect your honesty and see your admission as a way of telling them that you are really committed to them. It will also model recovery from a "slip".

You may become distracted by your reservation regarding a participant's action plan and/or concerned about its health impact. If you are concerned about health implications you need to state your concerns/reservations to the client. If your concern is not related to health implications, you may request to share your reservation with the caveat that you are offering your own experience or opinion not judgment or advice.

### Be Prepared for the Unexpected

Before the group begins look at your plan and identify what is most critical to cover today. If there is an unanticipated interruption or time has suddenly gotten away from you notice where the group is vis-à-vis your plan, how much time you have left, name it (e.g., "I'm noticing that we have 20 minutes left and in the interest of time let's go to....") and go to the most critical aspects. The check-in and identification of next action steps are bottom line critical components. If most of a session is lost due to technical issues or an unplanned major interruption you may also want to explore the possibility of adding another session to the group.

## Working with a Co-Lead

Working with a co-lead offers so many advantages including sharing the work-load, bringing different styles, strengths, knowledge and skills to the group experience, a source of support and feedback for one another. And when working with a co-lead there are many things that need to be considered and addressed.

You want to make sure that you are both on the same page and in alignment with each other. Here too, an ounce of prevention is worth a pound of cure. Whether you co-create the group plan, use an established plan or design the group plan and the teaching segments separately, you want to know that you both have agreement and buy-in on the timing of each segment and on your respective roles and responsibilities. If you are going to work with a SME whose primary responsibility is teaching, you may need to do some education around group etiquette and protocol, understanding the basic concepts of coaching and the rules around giving advice and offering opinion. You don't want a SME to take over during group process with "do's" and "don'ts".

It is very useful to be aware of your co-lead's style, preferences and strengths. Can you work well with their style? Can they work with yours? You also want to discuss the topic of self-management with your co-lead ahead of time and decide how you will address it if issues arise. As a facilitator it's important for you to share with your co-lead any special challenges that you are facing – or at least that a challenge is up for you and vice versa. Co-leads have a responsibility to address with one another anything they are noticing that may be impacting the group as soon as possible after the group. Your own self-management is critical for you to effectively share with your co-lead any observations about them without judgment and to be able to discuss how you will proceed in the next session. The same is true when listening to your co-lead's observations about you. If you or your co-lead are finding something challenging during the group, being able to use one another to help self-manage is important and a powerful strategy. Co-leads can identify key words or phrases to trigger awareness. You can also use a technique called "break and take" where one co-lead takes over by addressing a question to the group, making an observation (e.g., how much time is left) or a statement to begin the next segment. The strategy is breaking into what your co-lead is saying and taking over. You do however want to do this respectfully and in a way that clearly is intended to move the process forward.

When working with a co-lead you will need to plan time to debrief after each session and at the end of the group. The debrief includes observations about the group process, any challenges that arose and how they were handled; any opportunities to consider for the next session or next group and any revisions to the group/session plan. You want to

discuss how the co-leading is going for each of you and any observations you have. Identify any adjustments you agree to or feedback to think about before the next session. Plan how you will assess and evaluate any adjustments to be made to the group plan or as a result of feedback.

## Getting Support for Yourself

Getting feedback and support for yourself as a group coach/facilitator managing the group process, managing difficult situations and self-management is invaluable. If you have a co-lead, use one another for brainstorming and feedback. Working with a coach, a coaching supervisor or mentor will help with:

- Identifying when you are off track
- When your agenda is in the way
- How to get back on track
- Working with challenging participants or situations in the group
- Clearing up self-management issues
- Brainstorming group strategy
- Applying coaching skills

Another excellent and cost efficient way to get support is by becoming part of a Supervision or Mentor Group or co-mentoring group. Coaches can get ideas from one another, learn from Mentor feedback to other members of the group as well as to oneself and the group process itself. There is also an opportunity to identify and shine the light on something that you are not seeing – a dynamic in the group or a self-management issue.

## Best Practices

### Use the Wellness Mapping 360° Model

The Wellness Mapping 360° model is thorough and comprehensive. It is evidence based – it works. And it provides a solid building structure that client, coach and group can lean into.

### Apply the Model – Apply the Entire Model – Do Not Mix and Match

You may make some minor adjustments, however, this model as with any coaching model is designed to work as a process that has a well-designed and integrated beginning, middle and end. You cannot begin with this model's beginning, stick in another model's middle and expect an effective or cohesive ending. The model works because of the integrity of its flow and design. If you dissect it – mix and match models – you are no longer using the Wellness Mapping 360° model.

### **Apply Best Core Coaching Practices**

1. Develop your coaching skills in the core competencies
2. Have a supervisor, mentor or group coaching support/feedback system in place
3. Apply the *“Know Your Client”* principle in every aspect of design and delivery
4. Know what the overall focus and intention for the group are – and stick to it
5. Set up clear ground rules and structure for the group that they can rely on and lean into
6. As coach, follow and keep the group’s ground rules too
7. Be genuine - and leave your ego at the door
8. Keep experiential learning and education to short periods and always include equal or double the amount of time for a debrief
9. Apply the *Kaizen rule* – small, steady and consistent when it comes to creating goals and action plans – maximize opportunity for success – minimize opportunities for failure
10. Apply the *“ounce of prevention is worth a pound of cure”* rule
11. Turn failure into learning
12. Keep it simple!

### **Jennifer Britton’s Best Group Coaching Practice Guidelines**

1. Create safe space
2. Less is More – remember the 80/20 rule
3. Meet/Connect with your participants before the group to for a brief “discovery” session
4. Include different approaches for different learning styles
5. ‘Homework’ – assignments in between sessions enhances the process - deepens the learning & forwards the action
6. Collaborate with a partner – you can share the work – double the coaching impact and have a collaborator to design and deliver
7. Allow yourself space when launching a program –take care of yourself and your needs





# **Appendix A**

## **Group Coaching Development Tools**

**Coaching Skills Self-Assessment Collaborative Sessions Guidelines Collaborative Sessions Notes Form Group Practicum Planning Guide Group Practicum Feedback Form Example of a Mind Map**

**Group Coaching Vision Development Tool Third Party Considerations Form**

**Know Your Client Assessment Tool Group Focus Design Tool**

**Group Venue/Structure Design Tool Group Evaluation Tool**

**Overview of Group Coaching Plan Requirements**

- **Group Coaching Design Plan - PartI**
- **Group Coaching Design Plan - PartII**
- **Group Coaching Design Plan - PartIII**
- **Group Coaching Design Plan - Parts IV &V**

**Group Design Example 1**

**Group Design Example 2**

# Coaching Self-Assessment

Look at each area and rate your comfort level from 1 to 5 (1= Not at all – 5= very well)

CORNERSTONE	SIGNIFICANCE FOR GROUP COACHING	1 Not at all	2	3	4	5 Very well
<b>I believe that people are naturally creative, resourceful and whole</b>	<ul style="list-style-type: none"> <li>- Recognizing each person in the group as a hero on his or her own unique journey</li> <li>- Recognizing that each person in the group is not just his or her thoughts feelings or behaviors?</li> <li>- Recognizing the 'group' as naturally creative and whole?</li> <li>- Recognizing your co-leader as naturally creative, resourceful and whole</li> </ul>					
<b>Focus on the Whole Person</b>	<ul style="list-style-type: none"> <li>- Recognizing that each client has a Big Whole Life Agenda and smaller agendas in service of their whole life agenda.</li> <li>- A small agenda - specific goal or action - is truly like a microcosm for the client's whole life.</li> <li>- The group can help clients work on smaller agendas and shine the light of awareness on how one small thing can impact or influence other aspects on one's life.</li> </ul>					
<b>Dance in the Moment</b>	<ul style="list-style-type: none"> <li>- Listen to each participant – notice body language</li> <li>- 'Listen' more to the whole environment. Notice the energy – what's not being said</li> <li>- To 'Dance' is to respond to the whole – individual participants lead – coach leads less – the group begins to take on a life of its own -</li> <li>- Coach notices what and who is leading</li> </ul>					
<b>Evoke Transformation</b>	<ul style="list-style-type: none"> <li>- Listen for key nuggets &amp; themes</li> <li>- Where can curiosity or a powerful question create new awareness?</li> <li>- Where can your reflection take the group deeper?</li> <li>- Where can your silence create an opening in the group?</li> </ul>					

ICF CORE COACHING COMPETANCY		1	2	3	4	5
Setting the Foundation	<b>Meeting Ethical Guidelines &amp; Professional Standards</b> Ongoing focus on ethics					
	<b>Establish the Relationship</b> Pre-Group Contact First session Throughout					
Co-Creating the Relationship	<b>Bringing in Coaching Presence</b> Bringing in coaching skills with authenticity and self-management					
	<b>Establishing Trust and Intimacy</b> Setting Ground rules & agreements Keeping to them					
Communicating Effectively	<b>Active Listening</b> Focused listening & Global listening Promoting group interaction					
	<b>Powerful Questions</b> Simple, focused questions to deepen the learning and forward the action					
	<b>Direct Communication</b> Adapt language to the group Simplicity Promote interactions directly between/among participants Clarify what is being said					
Facilitating Learning & Results	<b>Creating Awareness</b> For individuals / for the group Inquiry, Challenge, Homework, 80/20 rule Promote interaction in the group					
	<b>Designing Actions</b> Request, Inquiry, Challenge SMART Goals					
	<b>Planning &amp; Goal Setting</b> Check-in Using Tracking tools End of session check-out					
	<b>Managing Progress &amp; Accountability</b> Check-in Using Tracking tools End of session check-out Defining Measurable Outcomes					

## *Appendix A— Group Coaching Development Tools*

Look at your scores. What do you notice?

Identify one to three areas that you would like to focus on during this course.

Area One \_\_\_\_\_

Area Two \_\_\_\_\_

Area Three \_\_\_\_\_

What does each area of focus need?

Area One Need/Development \_\_\_\_\_

Area Two Need/Development \_\_\_\_\_

Area Three Need/Development \_\_\_\_\_

What can you do to develop each area of focus?

Plan Area One \_\_\_\_\_

Plan Area Two \_\_\_\_\_

Plan Area Three \_\_\_\_\_



## Collaborative Sessions Guidelines

### Group Wellness Coaching Class

#### Requirement:

- 3 collaborative sessions following chapters 4, 5, 6 & 7 in dyads or triads
- Complete a *Collaborative Session form* for each session and submit it to [annalise@realbalance.com](mailto:annalise@realbalance.com).

#### Directions

- I. Identify what speaks to you, calls you forth and/or challenges you for each collaborative session!

#### **1. Chapter 4 Topic - Creating Vision**

Possible Areas of Focus:

- Exploration of your professional vision for yourself as Group Wellness Coach.
- Exploration of your vision for a wellness coaching group.

#### **2. Chapter 5 Topic – Design Elements**

Possible Areas of Focus:

- Exploration of a possible group focus (wellness focus and/or health focus).
- Exploration of your group venue (in-person versus remote).
- Exploration of who your group audience could be.

#### **3. Chapters 6 & 7 Topics – Integrating the Real Balance Model and/or Using Interactive Exercises**

Possible Areas of Focus:

- Exploration of how to include the Wellness Mapping 360° model into your group.
- Exploration of how to include interactive exercises that will address all learning styles.
- Exploration of how to use interactive exercises to facilitate movement through different group stages.
- Exploration of how to use interactive exercises to deepen learning or punctuate a theme.
- Exploration of how best to include/integrate educational learning (i.e., short segments built into the group or education classes conducted before or concurrently with the group).
- Exploration of how to structure and conduct *the debrief*.

**II. Ways to Collaborate**

- **Brainstorm** with your collaboration team or buddy to generate new ideas or build on an idea you have.
- **Get Feedback** on your ideas.
- **Request coaching** if you are feeling stuck, scared or confused. Use your team or buddy discover your inner guidance and move forward.
- **Other** – is there some other way you would like to use this session that will help you?

**III. Complete the Collaborative Session Form**

**Your notes are about how you - not your team or buddy - used the session and your takeaways.**

- Use the form to identify what value the session had for you; how you used it and your take aways from it.
- You may decide to request someone in your triad or dyad buddy to take notes for you so that you can process with complete abandon. This can be very helpful and is fine as long as you write-up your own buddy session.

One way or another, it is recommended that you schedule and complete each collaborative session along with your notes shortly after we cover the related topics in class.

**Intention/Purpose of These Collaborative Sessions**

**Group work is collaborative.** Even if you design and deliver a group by yourself, once you get into the group, the process becomes collaborative with the participants.

**The sum of the parts is greater than the whole.** For the same reasons that we value and deliver groups (having an opportunity to be seen and heard, to bounce around ideas, to think *out loud or out of the box*, to get constructive and creative input/feedback, to receive encouragement and support) collaborative work helps us deepen the learning and forward the action.

When I work with coaches to develop their individual or group coaching practice we always look at vision and values, focus, audience and venue first. This lays the foundation. Next they identify 3 individuals to become their ‘feedback team.’ This team becomes an important part of their development process and contributes significantly to the success of their group practice. It provides an opportunity for feedback, brainstorming and support.

**Working with a co-leader.** You may currently be working with colleagues or you may chose in the future to work collaboratively with a co-leader. This collaborative work is a ‘mini sampler’ of being in the creative process with another coach.

*Don’t overthink this – Keep it simple - Use it in whatever way is helpful for you — Be outrageous – Step way out of the box – Or apply the Kaizen approach (small building steps) – Ask for what you want – And most of all have fun with it!*

## Group Wellness Coaching Collaborative Coach Session Notes

Submit your Collaborative Coach Notes to [annalise@realbalance.com](mailto:annalise@realbalance.com).

**Name:** \_\_\_\_\_

**Date:** \_\_\_\_\_ **Session** \_\_\_\_\_

**Topic/Focus:**

\_\_\_\_\_

Process Used (check all that apply): ☐ Brainstorming ☐ Feedback ☐ Other  
(Describe) \_\_\_\_\_

Opportunities/ Ideas Identified/ Discussed:

Challenges Identified/ Discussed:

Takeaways from Session:

Next Steps:



## Group Coaching - Practicum Planning Guide

### I. Overview

The experiential practicum provides you with the opportunity to practice and receive real time feedback on your own group coaching skills during the classes. Each coach will lead the class participants through a group coaching process and will receive feedback on your skills, strengths, group session design and areas for growth. This class is ideal for practicing virtual group facilitation and coaching, but is equally applicable to in-person and virtual groups.

### II. Deciding on Your Group Topic

Your topic can be whatever you chose as long as it is Wellness related. It may also have a health focus.

#### A. Wellness / Health

You may select any dimension of wellness. You may also choose to include a specific health focus that addresses an 'at risk' population or health concern.

#### B. What to Consider

##### 1. What Is Interesting to You

This may be your opportunity to design a group segment around an area of focus that is especially interesting to you to explore. In this case you will identify what you are interested in exploring and any specific feedback you would like.

##### 2. What You Want to Explore / Develop / Try Out / or Experience

This may be your opportunity to design a group segment that you want to take on a 'dry run', or to experiment with an exercise or a tool that you want to try out. This may be in preparation for a specific group you are planning to deliver, or just because you are curious! In this case you will identify what your intention is and any specific feedback you would like.

##### 3. What is Interesting to Your Audience

You may choose to offer two options to the group ahead of time and allow the group to determine the focus. You don't want to offer too many options – and you will need to be prepared to address whichever option the group selects. This approach engages the group's sense of ownership and buy-in before the group session begins.

### III. Structuring the Overall Group Session Design

#### A. Pre Group Possibilities

For the sake of managing time and beginning to engage your participants ahead of time, you may choose to contact the participants in advance to do one or a combination of the following:

1. Provide Group Focus Options to the participants to select.
2. Provide the Group Agenda/Plan.
3. Provide any tools/exercises you want the participants to do ahead of time or any materials to bring to the group.



## B. Deciding on Content

Points to consider:

1. What will enhance the topic and “bring it home” for the participants?
4. What will support different learning Styles?
5. What are you comfortable with?
6. What do you want to try out (to ‘swing out’ beyond your comfort zone)?

## C. Deciding on Structure

### 1. Flow and Continuum

You want to design a structure that takes the participants from where they are when the group begins (check-in) through an exploration of the topic and of themselves vis-à-vis that topic. You want to incorporate exercises/tools that will take the participants organically through the process of exploration while deepening their awareness, evoke thought and inspiration and/or energy and culminate in a commitment to action.

### 2. Keep It Simple

These are short group segments. For participants to have an opportunity for the content and group experience to “land” the KIS rule is very useful. Here less is often more!

### 3. Build in Time for Processing

Build in adequate time to process a powerful question, or debrief and exercise or learning segment.

### 4. Build in time for Commitments

Build in adequate time at the end for each participant to identify their commitment out loud to the group and to explore accountability.

*One Tip: take the time that you think any exercise or group process will take to complete and double it – give it twice as much time in your plan.*

## IV. Content – Required & Optional

### A. Required Components

#### 1. Pre-Group - Identify Anything Required

It is not necessary to have a pre-group communication unless there is something that you want participants to read or to do before the group or to bring with them to the group. *If you are going to utilize break-out sessions, a time saver can be pairing people up, identifying conference call numbers and assigning them to the pairs or triads ahead of time.*

#### 2. Statement of Topic

Whether you state the topic ahead of time in a pre-group communication or not, state your topic along with a brief statement of what the group will cover at the beginning of the group segment.

#### 3. Agreements

At the very least request an agreement for confidentiality. You may ask the group what additional agreements they would like to make; **OR** you may refer to the agreements that the class made during the first session. *Using the class agreements will save time for other things.*

#### 4. Check-In

Generally you want to begin with a ‘check-in’ especially if you have given the participants a pre-group assignment. You may use dyads to triads to check-in, in the service of time. A brief check-in helps to ground everyone and get people into the group focus. You can get creative and ask people to bottom-line or use one word or phrase to describe where they are at in their check-in.

#### Facilitate Learning

Facilitate learning through exploration using content (exercises, tools, sharing).

- Keep any exercises to 5-7 minutes.
- Ensure time to debrief an exercise or combination of exercises – either in the full group, in dyads/triads.

## 5. Coaching

- *Powerful Questions*

Powerful questions may take the form of asking the group as a whole to consider one or more questions relevant to the topic, asking participants to consider a question in a break-out session, or may be directed towards a specific individual in laser coaching. The use of one or more powerful questions can occur in pre-group preparation, during the group and/or as an inquiry to leave the group with.

- *Summarizing/Acknowledging*

- Acknowledge as the opportunity arises: acknowledge personal sharing, “aha” moments, willingness to swing out, to ‘stretch’, etc.
- Summarize what the group has covered.

- *Request Action*

Facilitate action by building in identification of an action step into the structure (during the group or at the end). Request that each participant identify something that they are ‘no kidding’ willing and ready to do following the group. You want that action to be specific, measurable, meaningful (has some ‘juice’ or passion power) and time-based.

- *Silence*

Coaching may also include laser coaching with an individual participant, “pause points” (use of silence) for individuals to reflect on something specific during the coaching process, looking at a different perspective, identifying themes, stating what you hear.

## 6. Commitments/ Take-Aways

Request each participant to commit to the action step they identified. Each one should commit out loud. If you have time you may want to ask your participant to share their take-aways from the group session.

## B. Optional Components

### 1. Breakout Sessions - Dyads/Triads

Break-out sessions can facilitate exploration, provide a safer way for people who may not be so comfortable to share in the larger group and can be time efficient for sharing. For our purposes we use a combination of WebX and conference call lines for break-out sessions.

### 2. Exercises

This may be your opportunity to try out something that you think you would like to use but have not used before; to explore how effective a tool or exercise may be in a particular context; or just to take yourself out of your own comfort zone.

Give thorough instructions. Try out any instructions on someone before the group. Don’t get bogged down in questions about instructions. If the majority understands request the others to do their best.

- **Use a Real Balance or Other Tool:** from the *Pathways to Wellness Journal*, from the *Group Wellness Coaching Essentials Manual*, the Wellness Coach Tool Kit or another source. Use a tool pre-group or during the group.
- **Guided Visualization:** use a known visualization or create one either as a prelude to an exercise or as the primary exercise. These appeal to both visual and auditory learners.
- **Drawing/Writing or Journaling Exercise:** pair a drawing/writing/journaling exercise with one or two powerful questions or use following an exercise to help it land. This appeals especially to visual and kinesthetic learners.
- **Use Geography:** Have participants explore their physical body (a mental ‘journey’ into their body), physically notice or connect with a part of their body, or do a physical action. This especially appeals to kinesthetic learners and may facilitate individuals moving ‘out of their head’ to access other parts of their physical, intuitive, feeling and creative selves.
- **Other:** What other ideas do you have!

### 3. Teaching Segment

You may want to include a brief teaching segment around a topic that you are or will be working with in your professional capacity.

- Keep any teaching segment to 5-7 minutes.
- Ensure time to debrief a learning segment – either in the full group, in dyads/triads.

## V. The Debrief & Feedback

### A. The Feedback Form

The feedback sheet helps participants look at the below coaching skills and techniques and to identify specific examples. It also provides the coach with feedback on strengths observed, any unique or distinguishing characteristics of the design or coaching and anything the participants/observers feel they would like more of that would enhance the group experience. The feedback sheet can be scanned and emailed to each coach.

### B. Giving Feedback

Constructive feedback is critical for us to grow as coaches. This is an opportunity to give feedback from two perspectives:

1. As a participant: What worked well - what you would have liked more of – what had a special impact for you.
2. As a coach: what coaching skills you noticed being used; any comments on the design or structure and the coach's energy in the group.

## VI. Sharing Ideas & Design

### A. Identify What Is Proprietary

You may choose to use a structure or tool that you will be or have used in a group that is proprietary to your organization or to a wellness program. In that case please do identify for the group that it is proprietary. If you use a proprietary tool it should be labelled appropriately and you may need to request the permission of the organization to use it.

### B. Available for Use

If your group session design is not proprietary and you are willing to share it with the group, feel free to email it to the participants. One of the values of this practicum is gaining new ideas about structure and design of a group session, and ways of implementing tools and process from one another.



### Group Practicum Feedback Form

Name of Coach:

Topic:

Identify What You Hear, Sense, Experience & Notice

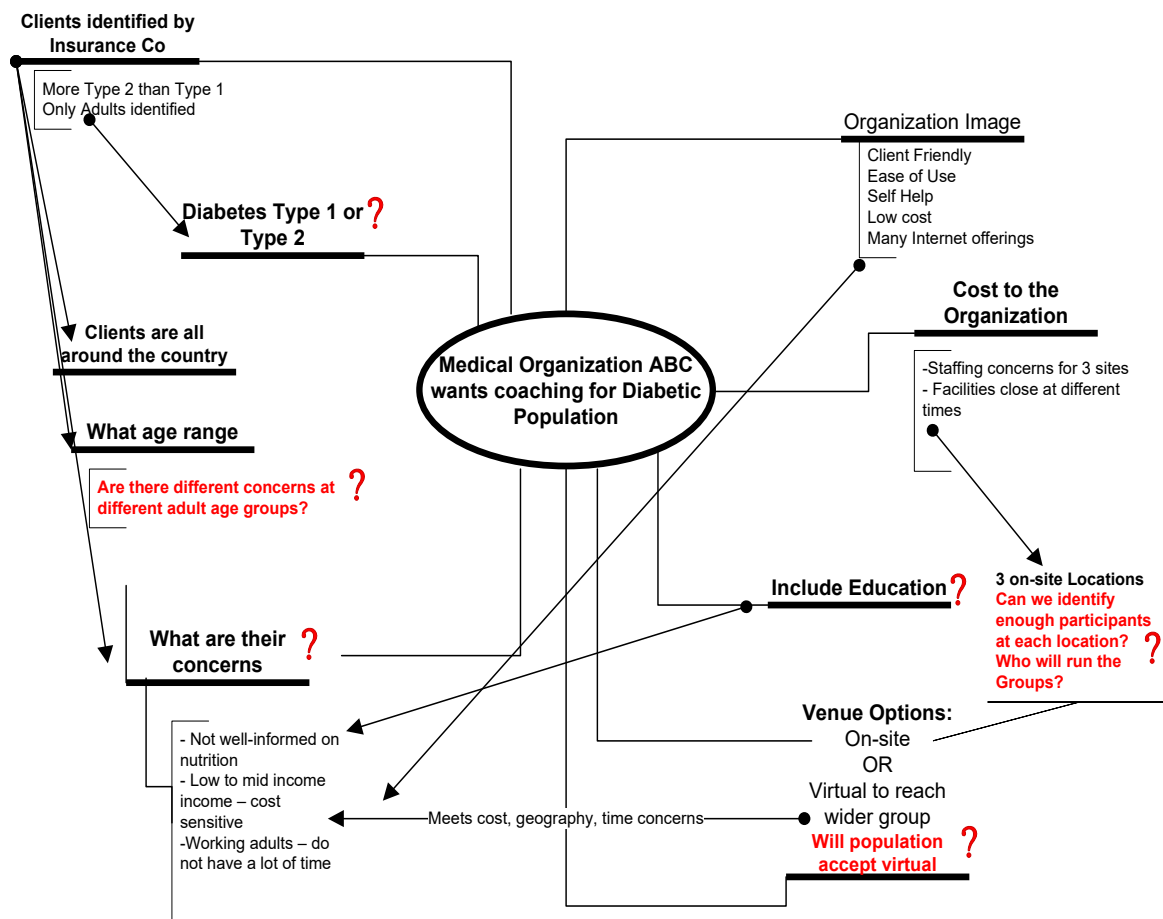
Group Coaching Skills	Techniques Used	Example (as appropriate)
Establishing Trust/Intimacy with Group		
Using different Adult Learning Strategies		
Using Wellness tools		
Using Interactive exercise's that are relevant		
Using Powerful Questions		
Tone of Voice/ Pace/ Pitch		
Direct Communication		
Group Facilitation skills – Involvement of others - Managing time		
Creating Awareness		
Designing Actions		
Managing Progress and Accountability		
Handling of Tricky Issues		
Energy (Coach's energy & Following energy)		
Other		

I really appreciated....

I see one of your strengths as....

I would like to see more of....

## Mind Map to Identify Best Venue for Coaching Group for Diabetic Population



### Take-aways in red:

- 1) More research on limiting age range
- 2) Acceptability of virtual group to audience
- 3) Cost & feasibility of using on-site locations



**Group Wellness Coach  
Vision Tool®**

*Relax, breath and imagine your best what your coaching practice would look like if it included group coaching.*

1. (Complete this sentence) What makes me feel passionate about wellness coaching is:
2. What makes wellness group coaching compelling for you (where is the *fire* in it for you)?
3. **Imagine** - What would your wellness coaching practice look like at your ideal level of group wellness coaching?
4. Make a list of the key aspects of your vision (when you **imagine** your practice):
5. What would you be doing more of?
6. What would you be doing less of?
7. **My Vision for Myself as Wellness Group Coach:** Either on your own or working with your buddy or coach arrive at a statement that (1) sums up your idea of what it would look to be living you Wellness Group coach vision and (2) feels delicious and exciting when you read it.



### Third Party Considerations Assessment Tool

<b>Organizational Mission/Focus</b>	
<b>Client/Community Image</b>	
<b>Benefit in Group Offering</b>	
<b>Concerns related to group offering</b>	
<b>Organization has a Wellness Program</b>	
Objectives	
Priorities	
HRA	
Resources for clients	
Resources for Group	
Other	
<b>Funding Resources</b>	
For Clients	
For Coaches	
For Educational Resources	
For Materials	
Other	
<b>Venue Resources</b>	
Space/location(s)	
Handicap Access	
Seating/Etc.	
Remote offering technical support /software	
<b>Other</b>	



### Know Your Client Assessment

Client is identified through Organization/Third Party	
Client is employee of Organization/Third Party	
Client will be sourced another way	
Client has a health challenge	
Restrictions related to health/physical challenges	
Age range	
Gender	
Geographic location	
Socioeconomic status	
Employment	
Cost concerns/price sensitivity	
Client availability	
Client format preference	
Level of Education	
Does Client have internet access/Internet savvy	
What are the client needs from a group	
- Education	
- Support	
- Reduced Risk Factors	
- Awareness	
- Other	
What are the client's goals	
Other	





## Group Wellness Coaching Focus Tool

<b>I. Wellness Focus</b>	
- General	
- Specific	
<b>II. Health Focus</b>	
- Risk Factors	
- Common Health Challenge	
- Stage of Challenge (3 R's)	
<b>III. Stage of Readiness</b>	
- General	
- Specific	
<b>IV. Other</b>	



## Group Wellness Coaching Venue/Structure Design Tool

Taking into consideration your audience & your group's Focus & any Third Party considerations (as applicable), assess Venue & Structure:

I Delivery	Advantages	Disadvantages	Best Option
- In person			
- Remote			
II. Overall Group Length			
- Option One			
- Option Two			
III. Frequency			
- Option One			
- Option Two			

IV. Session length	Advantages	Disadvantages	Best Option
- Option One -			
- Option Two -			
V. Time of Day/ Day of Week			
- Option One -			
- Option Two -			
VI. Minimum/Maximum Number in group			
- Option One -			
- Option Two -			



## Group Evaluation Tool

### I. Please rate the following on a scale of 1- 5:

1= Excellent 2=Very good 3=Satisfactory 4=Could Be Better 5=Poor

If you rated this item 3, 4 or 5, what would make it better?

- |                                  |       |       |
|----------------------------------|-------|-------|
| 1. The duration of the group     | _____ | _____ |
| 2. The length of each session    | _____ | _____ |
| 3. The location                  | _____ | _____ |
| 4. The number of participants    | _____ | _____ |
| 5. The topics covered            | _____ | _____ |
| 6. How the topics were presented | _____ | _____ |

### II. Please rate the following on scale of 1- 4:

1 = Very Helpful 2= Somewhat Helpful 3=Not Helpful 4=Don't Know

- |                          |       |
|--------------------------|-------|
| 7. Interactive exercises | _____ |
| 8. Guided visualizations | _____ |
| 9. Homework              | _____ |
| 10. Coaching             | _____ |

### III. Please write a brief answer to the following questions:

11. What would you like to have more of? \_\_\_\_\_
12. What would you like to have less of? \_\_\_\_\_
13. What had the most impact for you? \_\_\_\_\_ What was the impact it had? \_\_\_\_\_
14. Did this group meet your expectations (the reason you decided to participate in it)? \_\_\_\_\_
15. Would you recommend this group to a friend? \_\_\_\_\_
- Do you have any other suggestions for a future group or comments? \_\_\_\_\_



## Overview of Group Wellness Coaching Plan Requirements

Part I - Complete the [Coach Vision, Core Values, Group Producer & Creative Design Tools Form](#)

**Required:**

- Write a succinct description of your vision for the group.
- Identify your 3 guiding core values and anything especially meaningful about this group for you.
- Identify the 'group's producer': an organization or Wellness Program or you as an independent coach. If you identify an organization or Wellness Program complete the [Third Party Considerations Form](#).

**Optional:**

- Identify any tools that you used to assist you in developing your plan (e.g., mind mapping, index cards).

Part II – Complete the [Pre-Group Contact Form](#)

**Required:**

- Identify
  - Type of pre-contact (e.g., in-person, phone, email)
  - What you want to know about the potential participants
  - What information you want to give the potential participants
  - Any assessments or other tools you include in the pre-contact

Part III - Complete the [Assess & Consider Tools Form](#)

**Required:**

- Complete
  - The *Know Your Client* tool
  - *Group Focus Design* tool
  - *Group Venue & Structure Design* tool.

#### Part IV – Complete the [Overall Group Plan Form](#)

**Required:**

- Identify the name of the group (What you or the organization will call it)
- If the group has an organizational or wellness program sponsor, include a brief description of how the group will align with the mission and/or intended benefits and/or goals of the organizational or wellness program.
- Identify the group's wellness focus
- Identify the group's health focus (if applicable)
- Identify your overall goals for the group
- Identify your expected outcomes for the group
- Provide a brief description of the group's audience (participants)
- If the group includes educational segments, include a brief description of the educational focus and goals.
- Identify the number of group sessions and session length.
- Identify the group venue.

#### Part V - Complete the [Session Plan Form](#)

**A minimum of 4 sessions is required**

- Refer to the description at the end of the Session Plan Form.



## Part I of the Group Design Requirements

### Coach Vision, Core Values, Group Producer & Creative Design Tools

#### **My Vision Statement for the Group:**

--

#### **My 3 Guiding Core Values:**

1.
2.
3.

#### **Group Producer -This group is designed for:**

- An organization: \_\_\_\_\_
- Wellness Program: \_\_\_\_\_
- Myself as an independent coach: \_\_\_\_\_

If designed for an organization or Wellness Program include the [Third Party Considerations Form](#).

#### **Identify any creative design tools/processes that you used:**

--



## Part II of the Group Design Requirements - Pre-Group Contact

Will your group include a pre-group contact? Yes ☐ No ☐

If it will include a pre-group contact identify:

Type of contact - Email, Mailing, Phone, Combination, Other (identify)

What you want to know about the clients

What information you want to give the clients

Identify any assessments you want to include





## Part III of the Group Design Requirements – Assess & Consider

### Know Your Client Assessment

Client is identified through Organization/Third Party	
Client is employee of Organization/Third Party	
Client will be sourced another way	
Client has a health challenge	
Restrictions related to health/physical challenges	
Age range	
Gender	
Geographic location	
Socioeconomic status	
Employment	
Cost concerns/price sensitivity	
Client availability	
Client format preference	
Level of Education	
Does Client have internet access/Internet savvy	
What are the client needs from a group	
- Education	
- Support	
- Reduced Risk Factors	
- Awareness	
- Other	
What are the client's goals	
Other	



## Third Party Considerations Assessment – As Applicable

<b>Organizational Mission/Focus</b>	
<b>Client/Community Image</b>	
<b>Benefit in Group Offering</b>	
<b>Concerns related to group offering</b>	
<b>Organization has a Wellness Program</b>	
Objectives	
Priorities	
HRA	
Resources for clients	
Resources for Group	
Other	
<b>Funding Resources</b>	
For Clients	
For Coaches	
For Educational Resources	
For Materials	
Other	
<b>Venue Resources</b>	
Space/location(s)	
Handicap Access	
Seating/Etc.	
Remote offering technical support /software	
<b>Other</b>	



## Wellness Group Focus Design Tool

<b>I. Wellness Focus</b>	
- General	
- Specific	
<b>II. Health Focus</b>	
- Risk Factors	
- Common Health Challenge	
- Stage of Challenge (3 R's)	
<b>III. Stage of Readiness</b>	
- General	
- Specific	
<b>IV. Other</b>	



## Wellness Group Venue/Structure Design Tool

Taking into consideration your audience and your group' Focus and third Party considerations (if applicable), assess Venue and Structure

<b>I Delivery</b>	<b>Advantages</b>	<b>Disadvantages</b>	<b>Best Option</b>
- In person			
- Remote			
<b>II. Length</b>			
- Option One			
- Option Two			
<b>III. Frequency</b>			
- Option One			
- Option Two			
<b>IV. Session length</b>			
- Option One			
- Option Two			
<b>V. Time of Day/Day of Week</b>			
- Option One			
- Option Two			
<b>VI. Minimum/Maximum Number in group</b>			
- Option One			
- Option Two			



## Part IV of the Group Design Requirements Overall Wellness Group Plan

**I. Name/Title of Group:** \_\_\_\_\_

**II. Group Sponsor Information (if applicable - Group's alignment with mission/ Benefits/Goals):**

--

**III. Group Focus Information:**

Wellness Focus:
-----------------

Health Focus (if applicable):
-------------------------------

**IV. Overall Goals:**

--

**V. Expected Outcomes:**

--

**VI. Audience Information: (brief description)**

--

**VII. Educational Components (if applicable):**

Focus:
--------

<b>Goals:</b>
---------------

**VIII. Group Delivery Information:**

<b>Beginning/End Dates (length of group)</b> <b>Dates Excluded (e.g., holidays)</b>	
<b>Length of sessions</b>	
<b>Group Location/Virtual</b>	

**IX. Group Leaders**

Coach/Facilitator	Name	Credentials
Coach/Facilitator		
Co-Coach/Facilitator		
Additional SME(s)		



## Part V of the Group Design Requirements

### Wellness Session Plan (minimum of 4 – copy and add additional session plans as needed)

**Session #/Title: 1 :** \_\_\_\_\_

**Facilitator:** \_\_\_\_\_

**Date:** \_\_\_\_\_ **Time:** \_\_\_\_\_

**Focus/Purpose:**

**Goals:**

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials

Session #/Title: 2 : \_\_\_\_\_

Facilitator: \_\_\_\_\_

Date: \_\_\_\_\_ Time: \_\_\_\_\_

Focus/Purpose:

--

Goals:

--

Plan:

Length	Content/Topics	Mapping 360° Focus	Activity	Materials



Session #/Title: 3 : \_\_\_\_\_

Facilitator: \_\_\_\_\_

Date: \_\_\_\_\_ Time: \_\_\_\_\_

Focus/Purpose:

Goals:

Plan:

Length	Content/Topics	Mapping 360° Focus	Activity	Materials

**Session #/Title: 4 :** \_\_\_\_\_

**Facilitator:** \_\_\_\_\_

**Date:** \_\_\_\_\_ **Time:** \_\_\_\_\_

**Focus/Purpose:**

--

**Goals:**

--

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials

## Description and Examples for Session Plan

### I. Session #/Title

EXAMPLE: **Session 1** – Introduction & Setting the Wellness Coaching Arena

### II. Focus/Purpose:

The overall intention for this session. If the group is a half-day, one day or two day group, the number of sessions will depend on how you construct the time. If it is broken into sessions then create one for each session.

EXAMPLE: The purpose of this session is to set the intention for survivors to heal and to create their best lives.

### III. Goals:

List or state one or more goals for this session. You want to be able to tie the goals back to the focus or purpose – and to the desired outcomes for the group.

EXAMPLE: **Goals:**

- To build a safe and healing space
- To introduce, welcome and encourage each participant
- To explain and begin the program
- For participants to identify one goal for the program

### IV. Plan:

The *what, when and how* of the segment.

- **Length:** the length of each segment – usually in minutes (e.g., 10, 15, 20 minutes). Remember the rule for teaching segments is 5-7 minutes
- **Content:** The focus of that segment (e.g. Designing the alliance, individual introductions, establishing ground rules & agreements, check-in, nutrition education, wrap-up - review what was covered & statement of action step).
- **Mapping 360° Focus:** one or two of the 5 Wellness Mapping 360° Stages:
  1. Assess & Explore (**A&E**)
  2. The Personal Wellness Map or Plan (**Plan**)
  3. Accountability & Support (**A&S**)
  4. Ongoing Evaluation (**Eval**)
  5. Clear Measurable Outcomes (**MO**)
- **Activities:** what will done in that segment (e.g., laser coaching, group discussion, guided visualization, interactive exercise, use of a group coaching tool, teaching \_\_\_\_\_).
- **Materials:** Whatever things are required by the coach, SME or participants to complete the segment (e.g., flip-chart, journal, paper and drawing materials, PowerPoint, computer and projector).



## Group Design Example 1

### Part I of the Group Design Requirements

#### Coach Vision, Core Values, Group Producer & Creative Design Tools

##### My Vision Statement for the Group:

*To empower the participants to reach their personal visions for their well life and provide them with the tools and support to begin the journey and carry on after the group on their own.*

##### My 3 Guiding Core Values:

- 1. Creativity*
- 2. Courage*
- 3. Compassion*

##### Group Producer -This group is designed for:

- An organization:   X
- Wellness Program:
- Myself as an independent coach:

If designed for an organization or Wellness Program include the **Third Party Considerations Form**.

##### Identify any creative design tools/processes that you used:

*Focus Wheels*  
*Readiness for Change Inventory*  
*Well Life Vision Tool or Vision Board*  
*Tracking Tool*



## Part II of the Group Design Requirements

### Pre-Group Contact

Will your group include a pre-group contact? [Yes](#) No \_\_\_\_\_

If it will include a pre-group contact identify:

Type of contact - Email, Mailing, Phone, Combination, Other (identify)

*Welcome Package & Phone Call*

What you want to know about the clients

- *Their contact information*
- *Their concerns*
- *If they understand what a coaching group is and that is what they want*
- *If they are a good fit for the group or may profit from a referral to another program/resource*
- *What outcomes they want for themselves*
- *Their belief in their ability to manage stress (self-efficacy)*
- *Do they have the time and resources to manage stress*
- *What do they want to get out of the group*
- *Their learning style*
- *What they would like to learn more about stress and stress management (identify common themes for education focus)*

What information you want to give the clients

- *What coaching is and what the coaching group is about*
- *The group focus*
- *The basic structure and format we will use*
- *The dates/times of the group*
- *Buddy assignments and work*

Identify any assessments you want to include

*Learning style tool*



## Part III of the Group Design Requirements

### Overall Wellness Group Plan

I. Name/Title of Group: *Thriving in a Stressful Workplace*

II. Group Sponsor Information (if applicable - Group's alignment with Mission/ Benefits/Goals):

*Business assesses that stress is a leading factor of increased absenteeism and financial losses due to interruptions in work. Absenteeism is up by 20% over prior year. Total annual absenteeism is currently at 42% annually.*

*Business assesses financial cost in productivity and related costs (reallocating workload, projects delayed, and temporary replacements in support staff) is \$3000/absent employee annually.*

III. Group Focus Information:

Wellness Focus:

*Managing Stress and thriving in a stressful work environment*

Health Focus (if applicable):

*None specific – but participants may identify illnesses or conditions (e.g. elevated BP) that they have or experienced that are stress related*

IV. Overall Goals:

- *Each participant defines an integrated wellness plan they can continue to follow after the group ends*
- *Identify and try-out strategies to counter the stress response and promote the relaxation response*
- *Identify topics of interest for education around stress management and the effects of stress*
- *Set of a support system that the participants can continue to use after the group ends*
- *Reduce overall stress experienced in day to day work*
- *Reduce cost to the business due to the impact of stress*

**V. Expected Outcomes:**

*Reduction in level of stress – self-report by participants at the end of the group and 3 months and 6 months following the group*

*Learned and applied stress reduction techniques/tools – Identified via participant Tracking Tools and self-report*

*Reduced sick time absenteeism for group participants 3 months and 6 months following the group*

**VI. Audience Information: (brief description)**

*Company employees. Open to all. Voluntary basis – participation on pilot program to reduce stress.*

**VII. Educational Components (if applicable):**

*Focus: Impact of stress, stress management strategies and tools*

*Participants will be offered a variety of educational segment topics and will select the ones they want.*

**Goals:** *To empower the participants with information, awareness and tools*

**VIII. Group Delivery Information:**

<b>Beginning/End Dates (length of group)</b>	<i>1/15/16 – 4/15/16</i>
<b>Dates Excluded (e.g., holidays)</b>	<i>12 weeks</i>
<b>Length of sessions</b>	<i>45 minutes – during lunch break</i>
<b>Group Location/Virtual</b>	<i>Pilot will be on site at the central office location.</i>

**IX. Group Leaders**

Coach/Facilitator	Name	Credentials
Coach/Facilitator	<i>Susan Smith</i>	<i>Certified Health &amp; Wellness Coach</i>
Co-Coach/Facilitator	<i>John Doe</i>	<i>Certified in Mindfulness Training</i>
Additional SME(s)		



## Part IV of the Group Design Requirements

### Wellness Session Plan (minimum of 4 – copy and add additional session plans as needed)

Session #/Title: 1 *Introduce the Group*

Facilitator: *Susan Smith & John Doe*

Date: *1/15/16* Time: *12:00 – 12:55 PM*

Focus/Purpose:

*Set the foundation & Introduce the Group*

Goals:

*Describe the intent and process of the group*  
*Review the ground rules (what is non-negotiable)*  
*Participant introductions*  
*Create group agreements (what the participants want from each other and for the success of the group)*  
*Assign buddies*  
*Define what stress means for each one & identify an action step for the week*

Plan:

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
3 minutes	<ul style="list-style-type: none"> <li>Welcome Leader introductions</li> <li>Group Focus &amp; intention</li> <li>Describe group process</li> </ul>	A & E – Set the Foundation		
15 minutes	Participant Introductions Exercise – 3 minutes Share - 7 minutes	A & E – Set the Foundation	Hopes, Fears, Fantasies exercise  Group Share	Hopes. Fears, Fantasies sheet handout
5 minutes	Create group agreements	A & E – Set the Foundation		<ul style="list-style-type: none"> <li>Flip Chart to write agreements</li> <li>Handout at end with Agreements</li> </ul>
2 minutes	Define Buddy work Assign buddies	A & E – Set the Foundation	Participants self-select buddies	
15 minutes	Explore significance of stress for each one and what is one thing they can do to: <ul style="list-style-type: none"> <li>Become aware of stress this week</li> <li>Try a technique</li> </ul>	A & E	<ul style="list-style-type: none"> <li>Describe exercise</li> <li>Create triads</li> <li></li> </ul>	Coaches sit in briefly with each triad/dyad to ensure each one has a self-observation action step or technique action step
5 minutes	Review what was covered – next group date and time - Commitment to action	A & E Action & Accountability	Each participants commits to an observation or action	



**Session #/Title:** 2 *Creating Your Plan*

**Facilitator:** *Susan Smith & John Doe*

**Date:** 1/XX/16      **Time:** 12:00 – 12:55 PM

**Focus/Purpose:**

*Begin the plan creation for each participant*

**Goals:**

*Identify an area of focus (AoF) within the overall topic of stress management  
Identify Readiness for Change for the AoF  
Introduce definition of their individual vision*

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	<i>Check-in (how each one did with their action step – completed, did not do, did partially) Coach finds a positive comment for each one</i>	<i>A &amp; E Exploration</i>		
10 minutes	<i>Explore awareness &amp; barriers</i>	<i>A &amp; E Exploration</i>	<i>Open group discussion on what they noticed from their action and/or what got in the way if not successful</i>	
10 minutes	<i>Exercise – Identify Sub Area of Focus</i>	<i>Plan Defining</i>	<i>Participants Identify satisfaction with each dimension (1-10)  In Dyads select one dimension</i>	<i>Wheel of Life Balance &amp; Levels of Stress</i>
5 minutes	<i>Exercise Debrief</i>	<i>Plan Defining</i>	<i>Group Share – what did they notice in that exercise?</i>	
10 minutes	<i>Exercise – How Ready Are You? (for the Area of Focus they just selected)</i>	<i>Plan - RFC</i>	<i>Complete FRC Tool In Dyads: small group share</i>	<i>Readiness for Change Inventory</i>
5 minutes	<i>Exercise Debrief</i>	<i>Plan - RFC</i>	<i>Group Share What was that exercise like for them – what is their stage of readiness?</i>	
5 minutes	<i>Creating Your Vision – Topic for Next week – Request participants to think about their vision</i>	<i>Plan Defining</i>	<i>Hand out Well Life Vision tool</i>	<i>Well Life Vision Tool</i>
3 minutes	<i>Decide on education topics</i>	<i>A &amp; E</i>	<i>Identify topics to explore</i>	<i>Flip Chart with list of education topics of interest identified in the pre-contact</i>
5 minutes	<i>Review what was covered today - Commitment to Action (can be the Well Life Vision tool, continue awareness practice or a technique)</i>	<i>Plan - Commitment to Action &amp; Accountability</i>		

## Appendix A— Group Coaching Development Tools

**Session #/Title:** 3 *Creating Your Vision*

**Facilitator:** *Susan Smith & John Doe*

**Date:** 1/XX/16      **Time:** 12:00 – 12:55 PM

**Focus/Purpose:**

*Continue the Plan Creation*

**Goals:**

*Develop their Individual Vision  
Begin Education Segments*

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	Check-in (how each one did with their action step – completed, did not do, did partially) Coach finds a positive comment for each one	A & E Exploration		
10 minutes	Explore awareness & barriers	A & E Exploration	Open group discussion on what they noticed from their action and/or what got in the way if not successful	
7 minutes	Exercise – Future Self Visualization	Plan Vision	Conduct Guided visualization  Participants Journal following exercise	Future Self Visualization
5 minutes	Debrief	Plan	Group Share	
7 minutes	Select tool for creating their vision and working with buddies	Vision	Explain the different tools  Get together with buddy – create plan for defining their vision and create a plan to work together or check-in with each other during the next week	Well Life Vision Tool Example of Vision Board Journal
5 minutes	Educational Segment – impact of stress on the body	A & E Exploration		handout
5 minutes	Education segment debrief	A & E Exploration	Any Q & A – any thoughts comments they have	
5 minutes	Review what was covered today  Commitment to Action for creating vision, buddy work & any other	Plan - Commitment to Action & Accountability		

**Session #/Title:** 4 *Defining Your Goal*

**Facilitator:** *Susan Smith & John Doe*

**Date:** 2/XX/16      **Time:** 12:00 – 12:55 PM

**Focus/Purpose:**

*Continue the Plan Creation*

**Goals:**

*Define Goals and Action Steps for the Plan*

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	<i>Check-in (how each one did with their action step – completed, did not do, did partially) Coach finds a positive comment for each one</i>	<i>A &amp; E Exploration</i>		
10 minutes	<i>Explore awareness &amp; barriers</i>	<i>A &amp; E Exploration</i>	<i>Open group discussion on what they noticed from their action and/or what got in the way if not successful</i>	
20 minutes	<i>Exercise – Defining Your Goal &amp; One Action Step</i>	<i>Plan Goal &amp; Action Step</i>	<i>Identify who is in the Thinking (Preparation) Stage of Readiness, the Preparing stage and the Action Stage</i>  <i>Divide the group into sub groups by Readiness for Change</i>  <i>Each group discusses goals first and then action step</i>  <i>Coaches sit in with each group to facilitate goal setting that fits their readiness for change</i>  <i>Coaches review each participant's goal and action step</i>	<i>Note: facilitate goals and actions steps for earlier changes of readiness (Contemplation and Preparation) first.</i>  <i>Verify those in Action Stage have already made adequate preparation)</i>
10 minutes	<i>Exercise debrief</i>	<i>Plan Goal &amp; Action Step</i>	<i>Group Share</i>	
5 minutes	<i>Review what was covered today Commitment to the Action Step identified in the overall plan</i>	<i>Plan - Commitment to Action &amp; Accountability</i>		

## Appendix A— Group Coaching Development Tools

**Session #/Title:** 5 *Living the Plan*

**Facilitator:** *Susan Smith & John Doe*

**Date:** 2/XX/16

**Time:** 12:00 – 12:55 PM

**Focus/Purpose:**

*Steeping into Action with an Attitude of ‘Experimentation’*

**Goals:**

*Explore Initial Work with Their Plans*

*Introduce Tracking Tools*

*Continue Education Segments*

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	<i>Check-in (how each one did with their action step – completed, did not do, did partially) Coach finds a positive comment for each one</i>	<i>A &amp; E Exploration</i>		
10 minutes	<i>Explore awareness &amp; barriers</i>	<i>A &amp; E Exploration</i>	<i>Open group discussion on what they noticed from their action and/or what got in the way if not successful/does their goal and action step feel right</i>	
5 minutes	<i>Educational Segment – the need for adequate relaxation/repair</i>	<i>A &amp; E Exploration</i>		<i>handout</i>
5 minutes	<i>Education segment debrief</i>	<i>A &amp; E Exploration</i>	<i>Any Q &amp; A – any thoughts comments they have</i>	
5 minutes	<i>Exercise: feeling stress – feeling relaxation and repair Part 1: tightening all the body muscles, hold breath jump up and down or bounce  Part 2: let all muscles relax – shake out – move gently or in fun way around the room to light airy fun music</i>	<i>A &amp; E Exploration</i>	<i>Walk participants through the exercise</i>	
5 minutes	<i>Exercise Debrief</i>	<i>A &amp; E Exploration</i>	<i>Journal Group Share – what did they notice</i>	
5 minutes	<i>Group Discussion on Tracking</i>	<i>A &amp; E Accountability</i>	<i>What have they used What is the value of tracking</i>	
5 - 7 minutes	<i>Exercise Dyads: Selection of Tracking for the following week</i>	<i>A &amp; E Accountability</i>		
5 minutes	<i>Review what was covered today Commitment to the Action Step identified in the overall plan &amp; trying out a Tracking tool</i>	<i>Plan - Commitment to Action &amp; Accountability</i>		

**Session #/Title:** 6 *Living the Plan*

**Facilitator:** *Susan Smith & John Doe*

**Date:** 2/XX/16      **Time:** 12:00 – 12:55 PM

**Focus/Purpose:**

*Stepping into Tracking with an Attitude of ‘Experimentation’*

**Goals:**

*Explore Initial Work with their Plans*

*Review Tracking*

*Continue Education Segments*

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	<i>Check-in (how each one did with their action step – completed, did not do, did partially) Coach finds a positive comment for each one</i>	<i>A &amp; E Exploration</i>		
20 minutes	<i>Explore awareness, barriers &amp; use of tracking tools</i>	<i>A &amp; E Exploration</i>	<i>Open group discussion on what they noticed from their action and/or what got in the way if not successful/does their goal and action step feel right</i>	
5 minutes	<i>Educational Segment – value of movement as a strategy in the workplace during the day</i>	<i>A &amp; E Exploration</i>		<i>handout</i>
5 minutes	<i>Education segment debrief</i>	<i>A &amp; E Exploration</i>	<i>Any Q &amp; A – any thoughts comments they have</i>	
5 minutes	<i>Exercise: simple movement at your desk</i>		<i>Demonstrate or explain Technique and walk the group through it</i>	
5 minutes	<i>Exercise Debrief</i>		<i>Group Share – what did they notice  What else do they do or know about</i>	
5 minutes	<i>Review what was covered today  Commitment to the Action Step identified in the overall plan &amp; any other exploratory action (try out a movement action) if willing</i>	<i>Plan - Commitment to Action &amp; Accountability</i>		

## Appendix A— Group Coaching Development Tools

**Session #/Title:** 7 *Living the Plan*

**Facilitator:** *Susan Smith & John Doe*

**Date:** 2/XX/16      **Time:** 12:00 – 12:55 PM

**Focus/Purpose:**

*Continuing the Exploration*

**Goals:**

*Continue Education Segments*

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	<i>Check-in (how each one did with their action step – completed, did not do, did partially) Coach finds a positive comment for each one</i>	<i>A &amp; E Exploration</i>		
10 minutes	<i>Explore awareness &amp; barriers</i>	<i>A &amp; E Exploration</i>	<i>Open group discussion on what they noticed from their action and/or what got in the way if not successful/does their goal and action step feel right</i>	
5 minutes	<i>Educational Segment – mindfulness as a strategy</i>	<i>A &amp; E Exploration</i>		<i>handout</i>
5 minutes	<i>Education segment debrief</i>	<i>A &amp; E Exploration</i>	<i>Any Q &amp; A – any thoughts comments they have</i>	
10 minutes	<i>Exercise: Using a mindfulness technique that can be used during work hours or at home</i>		<i>Demonstrate or explain Technique and walk the group through it</i>	
10 minutes	<i>Exercise Debrief</i>		<i>Journal</i>  <i>Group Share – what did they notice</i>	
5 minutes	<i>Review what was covered today</i>  <i>Commitment to the Action Step identified in the overall plan &amp; any other exploratory action (try out a movement action) if willing</i>	<i>Plan - Commitment to Action &amp; Accountability</i>		

**Session #/Title:** 8 *Evaluating Your Plan and How We're Doing*

**Facilitator:** *Susan Smith & John Doe*

**Date:** 2/XX/16      **Time:** 12:00 – 12:55 PM

**Focus/Purpose:**

*Continuing the Exploration*

**Goals:**

*Continue Education Segments*

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	Check-in (how each one did with their action step – completed, did not do, did partially) Coach finds a positive comment for each one	A & E Exploration		
15 minutes	Evaluation Exercise: How's Your Plan Going?	Evaluation	Triads/Dyads: Discuss: <ul style="list-style-type: none"> <li>What's working well</li> <li>What could be better</li> <li>What would make it better</li> <li>What will you do to make it better?</li> </ul>	
10 minutes	Evaluation segment debrief	Evaluation	Group Share Statement of what they will do differently if anything was identified	
5 minutes	Participant Evaluation exercise How am I being a contribution to the group? What could I do differently?	Evaluation	Journal thoughts to both questions	Flipchart with Group Agreements
50 minutes	Participant Evaluation Exercise Debrief	Evaluation	Group Share	
10 minutes	Group Evaluation Exercise: What's working well? What would make it better?	Evaluation	Triads/Dyads Discussion	
5 minutes	Group Evaluation Exercise debrief	Evaluation	Group Discussion Coach identifies what would make it better on flipchart – ID plan to adjust	Flipchart
5 minutes	Review what was covered today  Commitment to the Action Step identified in the overall plan & any adjustments identified in the group	Plan - Commitment to Action & Accountability		

## Appendix A— Group Coaching Development Tools

**Session #/Title:** 9 & 10 *Growing into the Plan*

**Facilitator:** *Susan Smith & John Doe*

**Date:** 3/XX/16 **Time:** 12:00 – 12:55 PM

**Focus/Purpose:**

*Continuing the Exploration*

**Goals:**

*Celebrate Successes*

*Continue group's exploration of what works well, barriers and what support they have or what is needed*

*Continue Educational & Experiential Segments*

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	<i>Check-in (how each one did with their action step – completed, did not do, did partially) Coach finds a positive comment for each one</i>	<i>A &amp; E Exploration</i>		
20 minutes	<i>Explore awareness &amp; barriers &amp; getting support</i>	<i>A &amp; E Exploration</i>	<i>Open group discussion on what they noticed from their action and/or what got in the way if not successful/does their goal and action step feel right</i>	
5 minutes	<i>Educational Segment (e.g. effect of food on stress)</i>	<i>A &amp; E Exploration</i>		<i>handout</i>
5 minutes	<i>Education segment debrief</i>	<i>A &amp; E Exploration</i>	<i>Any Q &amp; A – any thoughts comments they have</i>	
5 minutes	<i>Exercise: mindful eating exercise technique that can be used during work hours or at home</i>	<i>A &amp; E Exploration</i>	<i>Each participant has 3 pieces of food – walk the group through observing, sensing (smell &amp; feel), then tasting - noticing texture, taste etc. for each one.</i>	<i>3 foods to eat easily</i>
5 minutes	<i>Exercise Debrief</i>	<i>A &amp; E Exploration</i>	<i>Journal</i>  <i>Group Share – what did they notice</i>	
5 minutes	<i>Review what was covered today Commitment to the Action Step identified in the overall plan &amp; any other exploratory action (try out a process or technique explored) if willing</i>	<i>Plan - Commitment to Action &amp; Accountability</i>		



**Session #/Title:** 11 *Preparing for After the Group*

**Facilitator:** *Susan Smith & John Doe*

**Date:** 3/XX/16      **Time:** 12:00 – 12:55 PM

**Focus/Purpose:**

*Planning for following through after the group*

**Goals:**

*What do they need to put in place*

*How can they use buddies*

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	<i>Check-in (how each one did with their action step – completed, did not do, did partially) Coach finds a positive comment for each one</i>	<i>A &amp; E Exploration</i>		
20 minutes	<i>Explore awareness &amp; barriers</i>	<i>A &amp; E Exploration</i>	<i>Open group discussion on what they noticed from their action and/or what got in the way if not successful/does their goal and action step feel right</i>	
5 minutes	<i>Exercise – What Do We Need to Continue the Plan?  How Can they Use Buddies/Each other?</i>	<i>A &amp; E Exploration</i>	<i>Dyads/Triads discussion</i>	
5 minutes	<i>Exercise Debrief</i>	<i>A &amp; E Exploration</i>	<i>Group Share Coach writes ideas on flipchart</i>	<i>Flipchart</i>
5 minutes	<i>Review what was covered today  Commitment to the Action Step identified in the overall plan &amp; any planning for the future action identified</i>	<i>Plan - Commitment to Action &amp; Accountability</i>		

**Session #/Title:** 12 *Moving Forward*

**Facilitator:** *Susan Smith & John Doe*

**Date:** 3/XX/16      **Time:** 12:00 – 12:55 PM

**Focus/Purpose:**

*Planning for following through after the group*

**Goals:**

*See where they are now*

*Celebrate success*

*Commitment to Continue*

*Evaluation*

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	<i>Final Check-in – “what’s my takeaway” from the last 12 weeks</i>	<i>A &amp; E Exploration</i>		
10 minutes	<i>Exercise – How Far We Have Come</i>  <i>Notice where they are now and how far they have come – what I have accomplished</i>	<i>A &amp; E Exploration</i>	<i>Conduct visualization</i>  <i>Journal:</i> <i>What they noticed?</i> <i>What has changed?</i> <i>What they are celebrating about themselves?</i>	<i>Guided Visualization Balloon Exercise from Appendix B</i>
10 minutes	<i>Exercise Debrief</i>	<i>A &amp; E Exploration</i>	<i>Group Share &amp; Celebration</i>	
20 minutes	<i>Commitment Exercise – how they will continue</i>	<i>Plan - Commitment to Continue Action &amp; Accountability</i>	<i>Conduct exercise</i>	<i>Cross the Line Exercise from Appendix B</i> <i>Need Tape &amp; paper</i>
5 minutes	<i>Complete written evaluation</i>	<i>Evaluation Measureable outcomes</i>		



## Group Design Example 2

### Part I of the Group Design Requirements

#### Coach Vision, Core Values, Group Producer & Creative Design Tools

##### My Vision Statement for the Group:

Through the knowledge, skills, insights, and support obtained from the group coaching experience participants will become empowered by the realization that they are the experts in their own lives, and that they are in the driver's seat to creating and realizing their own well-life vision dependent on their physical and mental habits.

##### My 3 Guiding Core Values:

1. Courage
2. Integrity
3. Loving-kindness

##### Group Producer -This group is designed for:

- An organization:   X
- Wellness Program:
- Myself as an independent coach:

If designed for an organization or Wellness Program include the [Third Party Considerations Form](#)

##### Identify any creative design tools/processes that you used:

Mind-mapping, Values Clarification Tools

## Part II of the Group Design Requirements

### Pre-Group Contact

Will your group include a pre-group contact? Yes: X No \_\_\_\_\_

If it will include a pre-group contact identify:

Type of contact - Email, Mailing, Phone, Combination, Other (identify)

In person  
Wellness Packet

What you want to know about the clients

Contact information.  
What is their experience with coaching, if any.  
Do they have any concerns or questions about the group coaching process.  
What do they hope to gain or learn from their experience (goals).  
What days/times are they available.  
Are they willing and able to attend on a regular basis.  
What concerns them most regarding their health or life after having a cardiac event.  
What have been their greatest challenges since their cardiac event.  
Are they familiar with mindfulness techniques or meditation.  
What is their learning style.

What information you want to give the clients

What coaching is and is not.  
The basic focus of the group coaching class.  
The concept of the group agenda.  
The basic structure and format of the classes.  
That there will be group buddy assignments and work to be completed in and/or outside of class.

Identify any assessments you want to include

Learning style assessment



## Part III of the Group Design Requirements

### Overall Wellness Group Plan

I. **Name/Title of Group: Moving Forward with Heart : A Mindfulness Approach to Change**

II. **Group Sponsor Information (if applicable - Group's alignment with mission/ Benefits/Goals):**

- 2016 Performance Improvement Goal for NOCO Banner cardiac rehabilitation departments states: “We will decrease the number of cardiac rehab drop outs by keeping patients engaged in their exercise program as measured by the number of patients that complete predetermined sessions of cardiac rehab.”
- Hospital goal of decreased readmission rates in general. For Medicare patients specifically, avoid readmission to hospital for any cause within 30 days.
- Improved cardiac rehabilitation program patient satisfaction survey scores.
- Improved Health Status Questionnaire and DASI scores from pre- to post-program participation.
- It is my belief that this Group Wellness offering can only help fulfill these stated missions of Banner generally, and the cardiac rehabilitation department specifically.

III. **Group Focus Information:**

Wellness Focus: Cultivating mindfulness to reclaim and adapt following a cardiac event

Health Focus (if applicable): Participants will self-identify what they want to “reclaim” which will likely include such health focus areas as increased exercise/movement (ie, to reclaim strength, endurance, “get back to doing everything I used to do before”), improved nutrition (i.e., to reclaim a healthy weight, reduce cholesterol, reduce high blood pressure, improve nutritional status), stress management (ie, to reclaim life balance and improve social connections), etc.

IV. **Overall Goals:**

- Each participant will have developed a well-life vision as motivation to help keep them on the path of rehabilitation and reclaiming their life after their cardiac event.
- Understand the concept and value of mindfulness in behavior change.
- Expose participants to a sampling of methods and exercises to cultivate mindfulness.
- Participants will have established connections and relationships among themselves to draw on for support and inspiration once the group dissolves.
- Introduce the role of thought acceptance and mindfulness in health behavior change. Identify topics of interest for education around methods to promote mindfulness, and how to develop more mindful responses to thoughts versus mindless/automatic reactions that can sabotage the wellness plan.

**V. Expected Outcomes:**

Participating in the group coaching class will increase self-efficacy and help participants to be more engaged in their own self-care. This in turn will improve “buy-in” to the rehabilitation process as they go through it, and improve adherence and completion rates.

Participants will have made progress in 1 to 3 activities that they identified as important to reclaim as evidenced by reaching their Milestones.

Patient satisfaction scores of the program will match or exceed a random selection of patients that did not participate in the group wellness coaching class.

Participants will have increased their awareness of their own thought processes and “gremlin talk”, and will have learned strategies to overcome it to keep them moving forward on their wellness plans.

**VI. Audience Information: (brief description)**

This will be a pilot program open to any patients currently participating in the cardiac rehabilitation program who would like to volunteer to participate. Class will be limited to 6-10 participants.

**VII. Educational Components (if applicable):**

**Focus:** Using mindfulness techniques and a mindfulness approach to behavior change in establishing a well-life vision and reclaiming and/or adapting to life after a major cardiac event.

Participants will learn the key characteristics of mindfulness.

Participants will be introduced to various mindfulness methods and will decide as a group on one to explore and practice.

Participants will practice applying mindfulness to specific health focus thought content (for example, exercise/movement, nutrition, smoking cessation, stress management, medication compliance), and will practice how to shift typical mindless/automatic responses to a thought to ones that are more mindful.

**Goals:** Increase participants' awareness of their own thought processes and how they can deter or enhance progress toward their well-life vision.

Understand mindfulness and the techniques that one can use to increase it.

Empower participants through education and experiential learning to recognize and accept their thoughts. And if their thoughts illicit behaviors that are counterproductive to their wellness plan to be able to shift to a mindful response.

**VIII. Group Delivery Information:**

<b>Beginning/End Dates (length of group)</b>	Thursdays starting May 5, ending July 7, 2016
<b>Dates Excluded (e.g., holidays)</b>	10 sessions
<b>Length of sessions</b>	One hour
<b>Group Location/Virtual</b>	North Colorado Medical Center, cardiac rehab education classroom

**IX. Group Leaders**

Coach/Facilitator	Name	Credentials
Coach/Facilitator	Kathy Miczulski	MS, CEP, CWHC
Co-Coach/Facilitator		
Additional SME(s)		



## Part IV of the Group Design Requirements

### Wellness Session Plan (minimum of 4 – copy and add additional session plans as needed)

**Session #/Title:** 1 - Introduction to Group Wellness Coaching, Setting the Foundation

**Facilitator:** Kathy Miczulski

**Date:** 5/5/16 \_\_\_\_\_ **Time:** 4:00-5:00 PM \_\_\_\_\_

#### Focus/Purpose:

Welcome, introductions, setting the foundation

#### Goals:

- Introductions
- Housekeeping (location of restrooms, parking options, kitty, etc.)
- Describe the intent and process of the group
- Create the ground rules, ways of working
- Assign buddies
- Introduction to mindfulness

#### Plan:

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	Welcome, leader introduction, housekeeping Group focus and intention Description of group process	A & E – Setting the Foundation		
15 minutes	Icebreaker - Participant introductions	A & E – Setting the Foundation	Participants choose a partner. Find 3 things you have in common, 1 thing unique, 8 min.  Group share – Each introduces the other to the group and take turns saying what they learned, 7 min.	“Everyone, this is Karen and I am Dave. We discovered that we both drive red cars, lived in New York at one time, and we both have an older brother”. “Hi folks, I’m Karen and this is Dave. One thing unique about me is that I drove an ice cream truck as a summer job. And Dave has a German Shepard named Max”.
7 minutes	Create ground rules, ways of working	A & E – Setting the Foundation		Whiteboard to write rules, markers/ Coach will create handout of rules



2 minutes	Define buddy work Assign buddies	A & E – Setting the Foundation	Participants choose their buddies	
7 minutes	Teaching segment: Define mindfulness and its key characteristics	A & E - Exploration		Provide handout
5 minutes	Teaching segment debrief	A & E - Exploration	Q & A, share thoughts, what would you add	
9 minutes	Group Inquiry: Since your cardiac event, reflect on area(s) of your life or current thought processes you think could benefit from being more mindful.	A & E - Exploration	Group divides into pairs or triads to discuss. 3 to 4-1/2 minutes each person.	Coach checks in briefly with each small group to facilitate or answer questions where needed.
5 minutes	Exercise debrief	A & E - Exploration	Group share – what came up?	If needed, coach facilitates - areas of life where you have stuck or persistent negative thoughts, resistance to accepting what is, persistent past or future thinking, “automatic pilot” behaviors? Was it different before your cardiac event?
5 minutes	Recap of session Verify next group date and time Commitment to action - What are they willing to experiment with this week to increase awareness of when and how they are being mindful, or when they are being mindless or responding automatically. Explain concept of “check-in”, starting next week	A & E Commitment to Action and Accountability	Each participant commits to an observation or action step for the week.	

**Session #/Title: 2 - The Practice of Mindfulness**

**Facilitator:** Kathy Miczulski \_\_\_\_\_

**Date:** 5/12/16 \_\_\_\_\_ **Time:** 4:00-5:00 PM \_\_\_\_\_

**Focus/Purpose:**

Introduce the general benefits of mindfulness, and techniques to cultivating it

**Goals:**

- Increase awareness of the benefits of mindfulness on health and well-being
- Increase awareness of how to be, and the value of, being mindful in daily activities
- Provide an opportunity to practice an exercise in mindfulness
- Cultivate group collaboration

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	Check-in: did participants complete all, part, or none of their action step? Coach finds something positive to say about each one. Distribute handout on ground rules	A & E - Exploration		
10 minutes	Explore awareness & barriers	A & E - Exploration	Open group discussion on what they noticed from their action and/or what got in the way if not successful	
18 minutes	Teaching segment: Mindfulness – more on what it is and the benefits. The video includes a practice sitting exercise.	A & E - Exploration	Watch YouTube video by Diana Winston, “The Practice of Mindfulness”. Participants follow the sitting exercise that's at the end.	Computer, projector, drop-down screen Handout – ways to be mindful in daily activities
10 minutes	Teaching segment and practice exercise debrief	A & E - Exploration	Journal, 4 min.  Group share – takeaways from the video, what did they notice from the practice exercise, 4 min.	Paper and pens for those that need it

7 minutes	Collaborative Exercise/Icebreaker – Making a Group Rhythm	A & E - Exploration	<p>Group stands in a circle facing inward. Coach: “We're going to make a group rhythm. All you need to do is watch and follow me”. Coach starts by walking in place to a beat of 4, participants follow. Coach then successively adds to the beat by drumming body parts and/or adding claps.</p> <p>Coach then divides group into two groups and asks for a volunteer to lead one group while she leads the other.</p>	<p>This exercise offers a kinesthetic opportunity for the group to begin to develop cohesiveness by working together as a unit, and to help each other by mirroring.</p> <p>Coach reminds group that this is an opportunity to be mindfully playful!</p> <p>From pyeglobal.org.</p>
5 minutes	Exercise debrief	A & E - Exploration	Group share – How did they feel about doing this exercise? What words would they use to describe how it was for them?	
5 minutes	<p>Recap of session</p> <p>Commitment to action - What are they willing to experiment with to further advance their awareness of mindfulness - apply something learned today? Be more mindful during an activity of daily living? Practice the sitting exercise done today? Practice a technique they are already familiar with?</p>	A & E Commitment to Action and Accountability	Each participant commits to an observation or action step for the week.	

**Session #/Title: 3 - Creating the Wellness Plan**

**Date:** 5/19/16 \_\_\_\_\_ **Time:** 4:00-5:00PM

**Focus/Purpose:**

Each participant begins to create their wellness plan

**Goals:**

- Provide the experience of using mindfulness (tapping into their inner guide) to setting intention, creating a plan
- Identify areas of focus that need attention
- Begin to identify which areas of focus are of most importance

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	Check-in: did participants complete all, part, or none of their action step? Coach finds something positive to say about each one.	A & E - Exploration		
10 minutes	Explore awareness & barriers	A & E - Exploration	Open group discussion on what they noticed from their action and/or what got in the way if not successful	
3 minutes	Meditation Exercise – Tap into inner wisdom to find what is most important in my life right now that I may not be paying attention to	A & E – Exploration  Set the intention, preparation for planning	View/participate in video “Insight Meditation” from Dr. Dean Ornish's website, <a href="http://ornishspectrum.com">ornishspectrum.com</a>	Computer, projector, drop-down screen
5 minutes	Exercise debrief	A & E – Exploration  Set the intention, preparation for planning	Group share – what was this brief guided meditation like for them, what did they notice?	

10 minutes	Identify areas of focus that need attention	Plan	<p>Explanation of tool: Participants rate their level of satisfaction from 1-10 with each dimension. Participants rate each dimension's level of importance from 1-10, 5 min.</p> <p>Group divides into pairs or triads to discuss, 5 min.</p>	Wheel of Life (WOL)
5 minutes	Exercise debrief	Plan	Group share – what did you learn? What did they notice about the smoothness or bumpiness of their wheel?	
10 minutes	Reclaiming	Plan	<p>Explanation of tool: Participants list 7 activities they used to do but have not done since their cardiac event. Choose 5 and rate the possibility of doing each activity again, and its importance. Identify and rank the 3 most important and doable.</p>	Reclaiming Tool (RC)
5 minutes	Exercise debrief	Plan	Group share – Any new insights? What do you need to do?	
5 minutes	<p>Recap of session</p> <p>Commitment to action – options may include continuing to be aware of opportunities to be more mindful, practicing exercises learned in class or ones they are already familiar with, or journal on what came up for them using the WOL and RC tools to further their awareness or provide clarity.</p>	Plan - Commitment to Action and Accountability	Each participant commits to an observation or action step for the week.	

**Session #/Title: 4 - Creating the Wellness Plan**

**Facilitator: Kathy Miczulski**

**Date: 5/26/16** \_\_\_\_\_ **Time: 4:00-5:00PM**

**Focus/Purpose:**

Continue creating the plan, adding vision and focus  
Continue to connect mindfulness into the planning

**Goals:**

- Each participant begins to create their well life vision
- Begin to identify an area of focus to work on within the vision
- Understand the difference between focus area, goals, and action steps
- Introduce another mindfulness technique

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	Check-in: did participants complete all, part, or none of their action step? Coach finds something positive to say about each one.	A & E - Exploration		
10 minutes	Explore awareness & barriers	A & E - Exploration	Open group discussion on what they noticed from their action and/or what got in the way if not successful	
20 minutes	Exercise - Create well life vision	Plan - vision	Hand out and explain WLV tool, MAP approach to setting goals, and SMART goals, 4 min.  Participants get together with their buddy and help each other complete the tool, 8 minutes each.	Well Life Vision Tool (WLV)  Handout on MAP and SMART goals  Can use Wheel of Life and Reclaiming Tools from last week as guides as well

5 minutes	Exercise debrief	A & E - Exploration  Plan	Group share – what was the most challenging thing about that activity? Now what do you need to do?	
4 minutes	Mindful exercise - Square Breathing	A & E - Exploration	Coach explains & demonstrates: at top of inhalation hold for 2 seconds, at bottom of exhalation, hold for 2 seconds before taking next breath, participants try square breathing, 1-2 min.	
5 minutes	Exercise debrief	A & E - Exploration	Group share – what did you notice, observe?	
6 minutes	Buddy work topic for the week – Continue to create well life vision	Plan – vision, preparation for mapping the plan	Hand out WLF and RLC tools. Explain that participants will apply the RLC tool to the areas of life they will focus on (up to 5) as identified on their WLF tool, and see how they score. They then identify one focus area they want and are ready to move on, (scored 30-50 points).  Participants pair up with buddy and co-create a plan for working together on completing the WLF tool & their vision, or how they will assist or check in with each other prior to next class.	Well Life Focus Tool (WLF)  Readiness for Lifestyle Change Tool (RLC)
5 minutes	Recap of session Commitment to action to creating Well Life Vision with assistance from buddy. Participants may also continue to take action to further awareness of or to practice mindfulness.	Plan - Commitment to Action and Accountability		

**Session #/Title: 5 - Creating the Vision**

**Facilitator: Kathy Miczulski**

**Date: 6/2/16** \_\_\_\_\_ **Time: 4:00-5:00PM** \_\_\_\_\_

**Focus/Purpose:**

Continue creating the plan, begin to map the plan

Mid-class evaluation, check-in

**Goals:**

- Identify one area of focus on which to work for the remainder of the class
- Define goals and one action step for their chosen area of focus
- Group selects a topic of most importance or challenge on which to practice mindful approach
- Assess how the group feels the class is going

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	Check-in: Did participants get together with their buddy? Did they complete all or part of their well life vision? Did they complete all, part, or none of other action steps? Coach finds something positive to say about each one.	A & E - Exploration		
10 minutes	Explore awareness & barriers	A & E - Exploration	Open group discussion on what they noticed from working with their buddy during the week, or about their action, and/or what got in the way if not successful.	
15 minutes	Exercise – Identify one area of focus, define goals of focus area and one action step	Plan – vision, mapping	Participants get into pairs or triads and help each other complete the WLF tool – identify initial focus area (3 month planning process) , goals within focus area, one action step.	Well Life Focus Tool (WLF)  Note: those that have already completed the tool for their first focus area can form their own small group to begin work on a second one.  Coach facilitates by checking in on each small group.  Coach reviews goals and action steps of each participant.



5 minutes	Exercise debrief	Plan	Group share – what did you learn? What could be a next step?	
4 minutes	Group decides on an area on which to practice “a mindful approach to change” for a future class. Purpose is to provide an example of how mindfulness and mindful responses can be applied to any area of challenge.	A & E	Survey the group to see which topic gets the most votes.	Topics gathered during the pre-contact (what concerns them most, what has been their greatest challenge since their cardiac event).  Whiteboard with the list of concerns and challenges (can add more if the group decides)/ Markers
3 minutes	Visualization Exercise	A & E	Participants sit quietly with eyes closed or open with downward gaze. Coach leads guided visualization	Visualization to their favorite place, allowing time to imagine sights, sounds, sensations, feelings.
5 minutes	Exercise debrief	A & E	Group share – what was that like? What was the hardest thing about that exercise? The easiest?	
8 minutes	Class Evaluation– Emeralds and Slugs	Ongoing Evaluation	Divide group into 3 small groups for discussion: Regarding the class so far, what’s working well- what do you want more of (Emeralds) –What are things you don't like or want less of (Slugs) – scribe writes down on yellow index card, 4 min.  Coach divides chart into 2 columns and records Emeralds and Slugs. Group decides on adjustments going forward, 4 min.	Green and yellow index cards, pens  Flip-chart, markers  From pyeglobal.org.  Scribe keeps track on green index card.  Scribe keeps track on green index card.
5 minutes	Recap of session Commitment to action	Plan - Commitment to Action and Accountability	Each participant commits to an observation or action step for the week.	

**Session #/Title: 6 - Fine-Tuning the Plan**

**Facilitator: Kathy Miczulski**

**Date: 6/9/2016** \_\_\_\_\_ **Time: 4:00-5:00PM** \_\_\_\_\_

**Focus/Purpose:**

Increase awareness of barriers or challenges to implementing their plan and possible solutions

Understand the value and methods of tracking

**Goals:**

- Continuing to focus the wellness efforts
- Introduction to tracking tools
- Continue teaching segments on mindfulness, thought awareness, detachment

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	Check-in: did participants complete all, part, or none of their action step? Coach finds something positive to say about each one.	A & E - Exploration		
10 minutes	Explore awareness & barriers	A & E - Exploration	Open group discussion on what they noticed from their action and/or what got in the way if not successful	
10 minutes	Exercise - Exploration of challenges, strategies, sources of support	A & E – Exploration  Mapping the plan	Small group discussion. Participants get into pairs or triads. With your chosen focus area in mind, discuss what challenges, strategies to meet those challenges, and sources of support you've realized (or not) as you've begun to live your plan.	Coach checks in with each small group to facilitate, answer questions, provide direction, etc.
5 minutes	Exercise debrief	A & E - Exploration	Group share – what did they discover? What needs to happen now?	

10 minutes	Group discussion - tracking	A & E  Accountability	Provide handouts. Open discussion about the benefits of tracking and identifying indicators of success. Discuss methods. What have they used before?	Handouts: Weekly Plan & Review Tool, Weekly Tracker Tool, My Milestones, Change Contract (from Thriving With Heart Disease by Wayne Sotile – author has given permission to copy), blank monthly calendar.  Other ideas: wall calendar, journal, phone apps, online logs, pedometer, etc.
7 minutes	Teaching segment – detached awareness of thoughts and emotions, nonjudgmental observation	A & E - Exploration		Handout
5 minutes	Exercise debrief	A & E - Exploration	Group share – thoughts, comments, questions?	
3 minutes	Buddy work for the coming week	Plan - Commitment to Action and Accountability	Coach explains: Participants get together during the week with their buddy to discuss and help each other with tracking, or to discuss and brainstorm solutions to challenges they are facing implementing their plan, and what action step(s) they can take.	
5 minutes	Recap of session Commitment to action to use a tracking tool of choice for an action step in their plan and/or to track their thought processes as they take action (or don't!). They may also take an action step to overcome an identified challenge to their plan.	Plan - Commitment to Action and Accountability		

**Session #/Title:** 7 - Mindfully Living the Plan\_\_\_\_\_

**Facilitator:** Kathy Miczulski

**Date:** 6/16/16\_\_\_\_\_ **Time:** 4:00-5:00PM\_\_\_\_\_

**Focus/Purpose:**

Beginning to apply mindfulness to behavior change  
Plan evaluation

**Goals:**

- Assess how their plan is going
- Exploration of thought awareness, problematic reactions to thoughts
- Exploration of being nonjudgmental with our thoughts, letting go of labels

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	Check-in: did participants meet with their buddy? Did they complete all, part, or none of their action step? Coach finds something positive to say about each one.	A & E - Exploration		
12 minutes	Plan Evaluation - Group Inquiry	Evaluation	Participants get into pairs or triads to discuss their wellness plans: what's going well, what's not, brainstorm solutions, what will you do to improve it?	Coach checks in with each group to facilitate where needed
12 minutes	Evaluation debrief	Evaluation	Ball Toss – Coach tosses Nerf ball to first participant to offer statement about what they'll do differently regarding their plan. Participant tosses ball to someone else to offer their statement, and so on until all have spoken.	Nerf ball or bean bag for “talking rights”

15 minutes	Group inquiry – letting go of “good” and “bad”, cultivating detachment	A & E - Exploration	Give handout to participants to read. Coach asks participants to ponder, What lesson(s) are to be learned from the parable? Can you think of a time when something “bad” actually brought something “good” in hindsight? Have you noticed anything “good” that has happened since your cardiac event?, 5 min.  Participants journal, 10 min.	Handout – The Parable of the Chinese Farmer  Paper and pens for those that need it
10 minutes	Inquiry debrief	A & E - Exploration	Group share – thoughts, comments, insights, questions?	
5 minutes	Recap of session Commitment to action to increasing awareness of how we judge and label our thoughts. Commitment to action to practicing letting thoughts go, or practicing a mindfulness exercise done today, in a past class, or one they already know. Can you implement a tracker tool to document action? Can you take other action steps to improve your plan and how will you track it?	Plan - Commitment to Action and Accountability		

**Session #/Title: 8 - Mindfully Living the Plan**

**Facilitator: Kathy Miczulski**

**Date: 6/23/16**\_\_\_\_\_ **Time: 4:00-5:00PM**\_\_\_\_\_

**Focus/Purpose:**

Participant self-assessment  
Further exploration of applying mindfulness to behavior change, sample challenge

**Goals:**

- Assess how participants think they are doing as a contributor to the group
- Practice creating mindful responses to thoughts
- Practice a kinesthetic mindfulness exercise

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	Check-in: did participants complete all, part, or none of their action step? Coach finds something positive to say about each one.	A & E - Exploration		
5 minutes	Self-reflection Exercise	Evaluation	Coach asks participants to reflect on 1) how they've contributed to or been a positive influence on the group, and 2) what they could do to be a better group player or to stretch their comfort zone.  Journal	Paper and pens for those that need it
5 minutes	Exercise debrief	Evaluation	Ball Toss – Each participant makes one statement about 1 or 2 above, then tosses the ball to someone else until all have shared.	Nerf ball or bean bag for “talking rights”

7 minutes	Teaching segment – How mindfulness can be applied to movement/exercise (high-priority challenge previously identified by the group)	A & E - Exploration	Coach provides an example: <b>Thought:</b> “This physical discomfort is too much. I can't keep up with this exercise routine.” <b>Mindless/automatic reaction:</b> I feel discouraged, hopeless. I may stop the physical activity regimen. <b>Mindful response:</b> Because I experience some discomfort does not necessarily mean I am unable to do any exercise. I am more fully aware of all physical aspects of the experience – both positive (I have more energy) and negative (discomfort) sensations.	Handout – Application of mindfulness to exercise-specific thought content. Changing a mindless or automatic response to a thought to one that is mindful.  Source: “The Role of Mindfulness in Health Behavior Change” by Gareth R. Dutton, ACSM's Health & Fitness Journal, Vol.12/No.4, July/August, 2008
5 minutes	Teaching segment debrief	A & E - Exploration	Group discussion – thoughts, questions, comments?	
10 minutes	Exercise – Practice in creating mindful responses to thought content	A & E - Exploration	Group divides into two groups. Participants work together and brainstorm mindful responses to their given thought, countering the mindless/automatic reaction.	Flip-chart with the following written on it:  <b>First group's thought:</b> “I'm really craving a cheeseburger and fries.” <b>The mindless/automatic reaction:</b> I go through the drive-thru and satisfy my food craving.  <b>Second group's thought:</b> “I'm so stressed out. I think I need some chocolate!”. <b>The mindless/automatic response:</b> I eat in response to negative emotions or stress.
5 minutes	Exercise debrief	A & E - Exploration	Group share – what did they learn from the exercise? Was it easy or hard to come up with an alternative response? Can you see where you might be able to experiment with doing this with your own challenges?	

## Appendix A— Group Coaching Development Tools

8 minutes	Mindfulness exercise	A & E - Exploration	Coach provides instructions. Participants choose to either do a mindful walk in silence, or color a mandala of their choice in mindful silence.	Selection of blank mandalas Colored gel pens
5 minutes	Exercise debrief	A & E - Exploration	Group share – what did they notice or learn from the exercise?	
5 minutes	Recap of session Buddy work for the week Commitment to an action step identified in their plan. Willing to experiment with taking a mindful approach? How can you use a tracker tool to help? Other options for commitment to action: continue bringing awareness to how we judge and label our thoughts. Continue practicing letting thoughts go, or practicing a mindfulness exercise done today, in a past class, or one they already know.	Plan - Commitment to Action and Accountability	With their Well Life Visions in mind, participants work with their buddy to identify where mindless/automatic reactions have kept them “stuck” and unsuccessful in making changes in their chosen focus area and/or with their action steps. Brainstorm mindful responses.	



**Session #/Title:** 9 - Keeping the Plan Momentum Going\_\_\_\_\_

**Facilitator:** Kathy Miczulski

**Date:** 6/30/16\_\_\_\_\_ **Time:** 4:00-5:00PM\_\_\_\_\_

**Focus/Purpose:**

What needs to happen to keep their plan moving forward after the group ends

**Goals:**

- Strategize ways to stay on track with the plan
- Build motivation and self-confidence

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
5 minutes	Check-in: did participants complete all, part, or none of their action step? Coach finds something positive to say about each one.	A & E - Exploration		
5 minutes	Explore awareness & barriers	A & E - Exploration	Open group discussion on what they noticed from their action and/or what got in the way if not successful	
15 minutes	Appreciation Closure Exercise		Each one has a blank piece of paper. They write their name on the bottom and pass it to the person on their left. That person writes something at the top to describe what they most value about the person whose name is on the bottom. Fold the paper so comments are covered & pass it on to the next person. Repeat until everyone has added to the paper with their name on it back. Everyone reads their own comments quietly & marks the one they like the best. Each person stands & say the strength they liked (using "I am. ." or "I have. ."). Take their paper home and treasure it.	Paper and pens  Coach explains to group that when you hear about your strengths from others and acknowledge them yourself, this builds your motivation and self-confidence.  From <a href="http://nickheap.co.uk">nickheap.co.uk</a>

## Appendix A— Group Coaching Development Tools

8 minutes	Exercise debrief	A & E - Exploration	Group Share – what did they learn? How did the exercise make them feel? Were there any surprises?	
15 minutes	Group Inquiry – What do we need to do to continue the plan? How can we support each other? Do you want to continue to use your buddy? If so, how?	A & E - Exploration	Coach divides group into 3 smaller groups for discussion.	
8 minutes	Group Inquiry debrief	A & E - Exploration	Group Share – coach writes down ideas	Whiteboard, markers
4 minutes	Session recap. Coach asks each participant to use one word to describe today's session. Commitment to action step from the plan and/or from ideas shared today to keeping the plan moving forward.	Plan Commitment to Action & Accountability		

**Session #/Title: 10 - Keeping the Plan Momentum Going**

**Facilitator: Kathy Miczulski**

**Date: 7/7/16** \_\_\_\_\_ **Time: 4:00-5:00PM** \_\_\_\_\_

**Focus/Purpose:**

Looking back and looking forward with the plan

**Goals:**

- Reflection
- Commitment to moving forward, looking ahead
- Time to celebrate successes
- Evaluation

**Plan:**

Length	Content/Topics	Mapping 360° Focus	Activity	Materials
10 minutes	Reflection Exercise – a final check-in	A & E – Exploration  Plan - Commitment to Continue Action and Accountability	Request: What are 3 things participants can celebrate, 2 things they need to explore further, and 1 new thing they haven't yet tried but can start tomorrow.  Journal	Paper and pens for those that need it
10 minutes	Exercise debrief	A & E - Exploration	Group share	
15 minutes	Dreamcatcher Wrap Exercise	A & E – Exploration  Plan - Commitment to Continue Action and Accountability	Stand in a closing circle. Explain directions: Hold ball of yarn & share: “One thing I have learned is... And therefore I will...” Then holding onto the string, throw the ball to another participant until everyone has gone.	Ball of yarn  From pyeglobal.org.
10 minutes	Exercise debrief Participants often see the final shape as something like “a spider’s web” and the coach can make reference to the strength of a web coming from its structure and its interconnectedness.	A & E - Exploration	Group share –what does the shape suggest?	Coach makes an explicit link to the connection that has formed in the group over the course of the work and the need for the support & strength that the group has generated to continue. This exercise also states that It can also be helpful to explicitly reference the “Dreamcatcher” of

				North American aboriginal cultures and reference how people have shared some of their inner selves with the group and how they have shared some personal dreams and ideas with it – and how powerful this can be if the individuals of the group continue to support each other’s dreams in the future.
5 minutes	Complete written evaluation	Evaluation Measureable outcomes	Each participant completes the evaluation	Copies of written evaluation, pens for those that need one
10 minutes	Celebration – party			Finger-foods, napkins, paper plates - provided by coach, bought with kitty money

## **Appendix B**

### **Assessments, Exercises & Tools**

**Strengths, Challenges, Opportunities & Barriers Tool**

**Hopes, Fears & Fantasies Exercise**

**The Miracle Question Exercise**

**Your Wellness Logo Exercise**

**Hot Air Balloon Visualization – Perspective**

**Crossing the Line Closure Exercise**

**Leaving Behind/Moving Towards Closure Exercise**

## Strengths, Challenges, Opportunities & Barriers Tool

Area of Focus or Goal\_\_\_\_\_

<b>Strengths</b>	<b>Challenges</b>
<b>Opportunities</b>	<b>Barriers</b>

## Hopes, Fears & Fantasies Exercise

This exercise can be done with the group as a whole or in dyads/tryads. It helps to elicit commonalities among participants and give the facilitator good information about the participants' expectations for the group and their own sense of self-advocacy.

Have participants name:

1. Hopes: What participants wish for from the group experience
2. Fears : What participants are anxious about
3. Fantasies: what is the really extraordinary thing they would like to have happen – imagine that there are no obstacles in their way and they will be successful no matter what.

Have participants identify in dyads, come back into the larger group and share OR have participants write it down individually and then share.

Facilitator: Write down what is shared on a flip chart – identify common themes. This is an opportunity to discuss expectations that will not be met; address concerns and fears, dispel unrealistic fears, use the group to brainstorm ways of addressed fears, and connect fantasies to the well life vision.

## **The Miracle Question Exercise**

This exercise can be done with the group as a whole or first in dyads followed by a group share. It is a great way to help participants get in touch with their own sense of self-advocacy, their well life vision, possibility thinking and to ignite motivation in one another.

1. Facilitator as the question:  
What if overnight a miracle occurred, and you woke up tomorrow morning and the problem was solved - What would be the first thing you would notice?
2. The group spends a little time thinking about and writing their answer
3. The Debrief:
  - Participants can share in dyad, triads or the general group as well
  - Identify take-always from their answers to their answers



## Your Wellness Logo

The purpose of this exercise is to create a structure that is visual and may include a word or phrase that the participants can use in and out of the group and which provides the other participants with information to call each other forth – to remind each other who they are when fear or confusion gets in the way. It can also facilitate the well life vision and identify motivating factors.

### **Preparation:**

3 X 5 cards or paper cut into pieces that can be easily seen by all the other participants when held up or worn by participants. String or nametag pin to attach the card or paper to (so that each participant can wear their Wellness Logo).

### **Process:**

The facilitator describes the concept of how organizations create image and memorable by lines and pictures to describe the essence of whom they are. Facilitator requests participants to think about what their desired wellness image or byline is; and then to draw it as a wellness logo.

The participants spend a few minutes drawing and writing on a paper large enough that can be seen by all.

Participants re-introduce themselves using their logo. This may also be used in the first session or subsequent sessions. They may wear their logo to each session or use it as a structure or both.

### **The Debrief:**

Ask Participants to think about:

- What was it like to do this exercise?
- What does the logo represent?
- What do you see in the other group member logo?

## Hot Air Balloon Visualization – Perspective

### General Directions

1. We are going to do an exercise – get comfortable – have your writing materials close by – Imagine yourself sitting where you are in your home or office and getting up –walking to the door and stepping outside – in front of you is a walkway – walk down the walkway and notice what’s around you – straight ahead is a gate and beyond the gate is a short stairway – walk through the gate – notice what it’s made of – which way it opens – in or out – and now walk down the stairway – straight ahead is a big hot air balloon – there is a person there to greet you and he or she opens the door for you to step into the balloon – step in and look around – maybe there is a seat – maybe you prefer to stand - maybe there are safety straps to buckle up to hold you safely in –

### What You Have Accomplished – Where You Have Come

**2A.** And now the attendant releases the balloon and you are rising into the air – notice what see – as you rise up 500 feet up, 1000 feet , and now to 2000 feet – and when you look down you can see where you have been and where you have come from to get here. What do you see? What do you notice about where you have come from?

### Where You Are Going

2B. And now the attendant releases the balloon and you are rising into the air - your hot air balloon drifting up and forward – its drifting up and you can see the earth getting smaller and smaller –you are moving forward in space. Your balloon is rising all the way to the moon – at the moon it begins to come back down to earth – the earth is getting bigger and bigger – the balloon stops at 500 feet and it’s six months from now – as you look down what do you notice about where you are – what has changed? How does it feel?

And now it’s time to return to earth – imagine that balloon drifting back down to (where you are) – the attendant is waiting for you – he opens the door for you to leave – imagine yourself walking up the stairwell and thought the gate – up the path and back to your door – into your home or office and your chair – And when you are ready open your eyes – come back into the room

**3. The Debrief:** Take a minute to jot down anything that’s important to you that you noticed on your journey. Participants can share in dyad, triads or the general group as well.

## Crossing the Line Closure Exercise

This is used at the end of a group. It contains qualities of an exercise and a closing ritual. The intention is to identify next step(s) that the participant is willing to commit to and then make the commitment in front of the entire group. It's important that what is committed to be relevant and realistic.

### Steps:

#### Part 1 Participants Chose a Next Step

1. Participants pair up and discuss one action step they will commit to and identify specifically what it is (e.g., the frequency and duration, and any accountability).
2. Write the action step down with its specifics
3. The group leader checks in with each one to verify that it is relevant and realistic.

#### Part 2 Preparation for Crossing the Line

1. The group leader uses tape or a rope that is tacked down to create a line across the entire room
2. All participants stand on one side of the line

#### Part 3 Crossing the Line

1. Each participant tells the group how they want the group to respond when they cross the line (e.g., silence, applause)
2. One by one participants:
  - Walk up to the line
  - Read or state their commitment out loud to the group using the words "I commit to....."
  - Cross the line
3. Group responds as requested
4. Continue until everyone has crossed the line

## Leaving Behind/Moving Towards Closure Exercise

This is used at the end of a group. It contains qualities of an exercise and a closing ritual. The intention is to identify what the participant is willing to “leave behind”, what they are “bringing with them” as they move on and what they are “moving towards.” The 3 statements may be defined in different ways. It’s important that what is committed to be relevant and realistic.

EXAMPLES:

### **What I am leaving behind:**

- Cigarettes
- Binge eating
- High BP
- Not moving

### **What I am taking with me:**

- My well life vision
- My buddy
- My wellness plan
- My goal to.....
- Knowing what I need to do when

### **What I am Moving Towards:**

- My goal to.....
- Living well with diabetes
- Thriving
- Living my best life

### **Steps:**

#### **Part 1 Preparation Identify Answers**

1. Participants spend 5 -10 minutes alone or in dyads to decide the answer to each question
2. They write it down

#### **Part 2 – The Set-Up**

1. Form a bridge -Two people (can be group leaders or group leader and one participant) stand opposite one another and raise arms to form a bridge (have fingers intertwined)
2. Each participant states out loud what they are leaving behind – what they are taking with them and – as they cross under the bridge what they are going towards – using the words:
  - I am leaving behind.....
  - I am taking with me .....
  - I am going towards.....
3. Each participant is celebrated after they cross through the bridge (applause, cheers, etc)