



WELLNESS & HEALTH COACH CERTIFICATION WORKBOOK

"First in Health &
Wellness
Coach Training"



Wellness & Health Coach Training Workbook



WELLNESS & HEALTH COACH CERTIFICATION TRAINING

Wellness Mapping 360™ Methodology

Hello and Welcome!

In this class you will learn wellness concepts, evidence based coaching competencies, and how to motivate others toward positive lasting lifestyle change.

As a learner your openness to your own journey of discovery will be a key in acquiring coaching skills because, if coaching is about nothing else, it is about genuineness. Being your true and authentic self, and being willing to look honestly at your own levels of wellness (in all dimensions) will be essential to this process. You are always free to choose what you want to share and what awareness you want to keep to yourself. What you do share will be kept within the confidential and professional boundaries of this course, and your agreement with this is required.

I invite you to enjoy the journey and feel free to come to me with thoughts, concerns, and ideas.

Thank you for contributions!



Coach Michael

Michael Arloski, Ph.D., PCC, CWP



WELLNESS MAPPING 360™
METHODOLOGY

www.realbalance.com

About the ICHWC

The International Consortium for Health & Wellness Coaching (ICHWC) and the National Board of Medical Examiners (NBME) work collaboratively to implement standards leading to certification as a health & wellness coach. The credential enables those certified to provide evidence of their expertise and quality as competent health & wellness coaches. Further, the credential allows stakeholders such as health care professionals, patients, employers, and educators to identify practitioners who have demonstrated the knowledge, skills, and abilities essential to effective health and wellness coaching.

ICHWC

Incorporated in 2017, ICHWC is an independent, not-for-profit organization that supports the worldwide advancement of the field of health and wellness coaching by implementing a standard supported by a certification examination and research.

NBME

Founded in 1915, NBME is an independent, not-for-profit organization whose mission is to protect the health of the public through state-of-the-art assessment of health professionals worldwide



ICHWC Health & Wellness Coach Scope of Practice

Health and wellness coaches work with individuals and groups in a client-centered process to facilitate and empower the client to develop and achieve self-determined goals related to health and wellness. Coaches support clients in mobilizing internal strengths and external resources, and in developing self-management strategies for making sustainable, healthy lifestyle, behavior changes. While health and wellness coaches per se do not diagnose conditions, prescribe treatments, or provide psychological therapeutic interventions, they may provide expert guidance in areas in which they hold active, nationally recognized credentials, and may offer resources from nationally recognized authorities such as those referenced in ICHWC's healthy lifestyle curriculum. As partners and facilitators, health and wellness coaches support their clients in achieving health goals and behavioral change based on their clients' own goals and consistent with treatment plans as prescribed by individual clients' professional health care providers. Coaches assist clients to use their insight, personal strengths and resources, goal setting, action steps and accountability toward healthy lifestyle change.

**adapted from NCCHWC Health & Wellness Coach Scope of Practice - February 1, 2017*

ICHWC Code of Ethics

(Updated February 1, 2017)

ICHWC is committed to maintaining and promoting excellence in coaching. Therefore, ICHWC expects all credentialed health and wellness coaches (coaches, coach faculty and mentors, and students) to adhere to the elements and principles of ethical conduct: to be competent and integrate ICHWC Health and Wellness Coach Competencies effectively in their work.

The ICHWC Code of Ethics is designed to provide appropriate guidelines, accountability and enforceable standards of conduct for all ICHWC Credential-holders. In line with the ICHWC definition of coaching, all ICHWC Credential-holders commit to abiding by the following Code of Ethics.

Part One: Definitions

- **Health and Wellness Coaching:** Health and Wellness Coaches partner with clients seeking self-directed, lasting changes, aligned with their values, which promote health and wellness and, thereby, enhance well-being. In the course of their work health and wellness coaches display unconditional positive regard for their clients and a belief in their capacity for change, and honoring that each client is an expert on his or her life, while ensuring that all interactions are respectful and non-judgmental.
- **ICHWC Coach:** A health and wellness coach certified by the ICHWC (after the National Certification Examination is available); and who thereby agrees to practice within the ICHWC Health and Wellness Coach Scope of Practice and Competencies and who pledges accountability to the ICHWC Code of Ethics.
- **Professional Coaching Relationship:** A professional coaching relationship exists when coaching includes an agreement (including contracts) that defines the rights, roles and responsibilities of each party.
- **Roles within Coaching Relationships:** In order to clarify roles in the coaching relationship it is often necessary to distinguish between the client and the sponsor. In most cases, the client and sponsor are the same person and are therefore jointly referred to as the client. For purposes of identification, however, the ICHWC defines these roles as follows:

Client: The “client” is the person(s) being coached. (May also be referred to as “coachee,” “patient,” or “member” in some settings.)

Sponsor: The “sponsor” is the entity (including its representatives) paying for and/or arranging for coaching services to be provided. In all cases, coaching agreements should clearly establish the rights, roles and responsibilities for both the client and sponsor if the client and sponsor are different people.

Student: The “student” is someone enrolled in an ICHWC-approved coach training program or working with an ICHWC-approved faculty member or coach mentor, in order to learn the coaching process or to develop and enhance his /her coaching skills.

Faculty: An individual who provides primary instruction/training to students enrolled in an ICHWC-approved coach training program.

Mentor: An individual who conducts coaching skills performance audits and provides feedback to coaching students/coaches for the purpose of developing and enhancing health and wellness coaching skills

Conflict of Interest: A situation in which a coach has a private or personal interest sufficient to appear to influence the objective of his or her professional role or responsibilities as a coach, faculty, or mentor.

Part Two: The ICHWC Standards of Ethical Conduct

Section 1: Professional Conduct at Large: As a health and wellness coach, I:

1. Conduct myself in accordance with the ICHWC Code of Ethics in all health and wellness coaching interactions, including coach training and coach mentoring activities.
2. Commit to take the appropriate action with the coach, faculty member, or coach mentor and/or will contact ICHWC to address any ethics violation or possible breach as soon as I become aware of such situation, whether it involves me or others.
3. Communicate and create awareness in others, including organizations, employees, sponsors, coaches, clients, potential clients, and others who might need to be informed of the responsibilities established by this Code.
4. Refrain from unlawful discrimination in occupational activities, including age, race, gender orientation, ethnicity, sexual orientation, religion, national origin or disability; and consistently demonstrate dignity and respect in all professional relationships.

5. Make verbal and written statements that are true and accurate about what I offer as a health and wellness coach, the coaching profession, and the ICHWC.
6. Accurately identify my coaching qualifications, expertise, experience, training, certifications and ICHWC credentials.
7. Recognize and honor the efforts and contributions of others and only claim ownership of my own material. I understand that violating this standard may leave me subject to legal remedy by a third party.
8. Strive at all times to recognize any personal issues that may impair, conflict with or interfere with my coaching performance or my professional coaching relationships. I will promptly seek the relevant professional assistance and determine the action to be taken, including whether it is appropriate to suspend or terminate my coaching relationship(s) whenever the facts and circumstances necessitate.
9. Recognize that the Code of Ethics applies to my relationship with coaching clients, students, mentees, sponsors, and other coaches.
10. Conduct and report research with competence, honesty and within recognized scientific standards and applicable subject guidelines. Research I participate in will be carried out with the informed consent of those participating and the approval of all regulatory bodies as indicated. Such research efforts will be performed in a manner that complies with the applicable laws and regulations of the jurisdictions involved.
11. Maintain, store and dispose of any records, including electronic files and communications, created during my coaching engagements in a manner that promotes confidentiality, security and privacy and complies with any applicable laws, regulations and agreements.
12. Use ICHWC-credentialed coach contact information, such as email addresses and telephone numbers, only in the manner and to the extent authorized by the ICHWC.

Section 2: Conflicts of Interest: As a coach, I:

13. Seek to be conscious of any conflict or potential conflict of interest, openly disclose any such conflict to all stakeholders involved, and offer to remove myself when a conflict arises.
14. Clarify roles for health and wellness coaches, set boundaries and review with sponsors and stakeholders conflicts of interest that may emerge between coaching and other role functions. Disclose to all clients the

exact nature of the coach's role within the company or organization, and the limitations and expectations thereof.

15. Disclose to my client and the sponsor(s) all anticipated compensation from third parties that I may receive for referrals of clients or pay to receive clients. Compensation from the sale of products or non-coaching services to clients must be disclosed fully before coaching begins. The quality of coaching services and the quantity of coaching sessions as defined in the coaching agreement must not be dependent in any way upon the purchase of any additional products or services by the client.
16. Honor an equitable coach/client relationship, regardless of the form of compensation.

Section 3: Professional Conduct with Clients: As a coach, I:

17. Ethically speak what I know to be true to clients, prospective clients or sponsors about the potential value of the coaching process or of me as a coach.
18. Make clear to any employer/sponsor and to the client what activities fall within the scope of practice within an ICHWC-certified health and wellness coach, as well as the outcomes that can be reasonably be expected.
19. Adhere to all ethical standards of practice for his/her respective health care licensures and credentials.
20. Carefully explain and strive to ensure that, prior to or at the initial meeting, my coaching client and sponsor(s) understand the nature of health and wellness coaching, the nature and limits of confidentiality, financial arrangements, and any other terms of the coaching agreement.
21. Have a clear coaching service agreement with my clients and sponsor(s) before beginning the coaching relationship and honor this agreement. The agreement shall include the roles, responsibilities and rights of all parties involved.
22. Hold responsibility for being aware of and setting clear, appropriate and culturally sensitive boundaries that govern interactions, physical or otherwise, I may have with my clients or sponsor(s).
23. Avoid any sexual or romantic relationship with current clients, sponsor(s), students, mentees or supervisees. Further, I will be alert to the possibility of any potential sexual intimacy among the parties including my support staff and/or assistants and will take the appropriate action to address the

issue or cancel the engagement in order to provide a safe environment overall.

- 24. Respect the client's right to terminate the coaching relationship at any point during the process, subject to the provisions of the agreement. I shall remain alert to indications that there is a shift in the value received from the coaching relationship.
- 25. Strive to protect the health, safety, and welfare of the client. I will encourage the client or sponsor to make a change if I believe the client or sponsor would be better served by another coach or by another resource, and I will support my client seeking the services of other professionals when deemed necessary or appropriate.

Section 4: Confidentiality/Privacy As a coach, I:

- 26. Maintain the strictest levels of confidentiality with all client and sponsor information unless release is required by law, specifically adhering to all applicable state and federal regulations.
- 27. Have a clear agreement about how coaching information will be exchanged among coach, client and sponsor, including mobile health/electronic health data collected by the client.
- 28. Have a clear agreement when acting as a coach, coach mentor, coaching supervisor or trainer, with both client and sponsor, student, mentee, or supervisee about the conditions under which confidentiality may not be maintained (e.g., illegal activity, pursuant to valid court order or subpoena; imminent or likely risk of danger to self or to others; etc.) and make sure both client and sponsor, student, mentee, or supervisee voluntarily and knowingly agree in writing to that limit of confidentiality. Where I reasonably believe that because one of the above circumstances is applicable, I may need to inform appropriate authorities.
- 29. Require all those who work with me in support of my clients to adhere to the ICHWC Code of Ethics, Number 26, Section 4, Confidentiality and Privacy Standards, and any other sections of the Code of Ethics that might be applicable.

Section 5: Continuing Development As a coach, I:

- 30. Commit to the need for continued and ongoing development of my professional skills.

Part Three: The ICHWC Pledge of Ethics:

As a Health and Wellness coach, I acknowledge and agree to honor my ethical and legal obligations to my coaching clients and sponsors, colleagues, and to the public at large. I pledge to comply with the ICHWC Code of Ethics and to practice these standards with those whom I coach, teach, mentor or supervise.

Adapted with permission from the ICF Code of ethics. Available at www.coachfederation.org/about/ethics. Accessed July 26, 2016.

Adopted by the ICHWC Board of Directors February 1, 2017.

If you have completed an Approved Transition Program, and you would like to apply to sit for the Health & Wellness Coach Certifying Examination, you will need to provide:

1. Demographic information (e.g. education, work experience) for research purposes
2. Documentation of an Associates degree or higher in any field.
 1. For those who do not have an Associates degree, exam candidates will need to provide documentation of 4,000 hours of work experience in any field.
 2. If you have completed an associate degree or higher, please complete the [HWC Education Declaration document](#).
 3. If you have not completed an associate degree or higher, please complete the [Work Experience Log](#).
 4. 10% of all exam applicants will be audited and asked to provide a transcript of their highest degree
3. A certificate of completion from an Approved Transition Program. (If you do not have a certificate of completion, the ICHWC can contact your program directly for verification.) *NOTE: If your program has an asterisk next to it, please include documentation of completion of the additional requirement. You must complete any additional requirement by May 15, 2017. If you do not have a certificate of completion from the program you attended, the ICHWC will contact your program for verification.*
4. A written log of 50 health and wellness coaching sessions of at least 20 minutes in duration, and of which at least 75% of each session is devoted to coaching facilitation and not education:
 1. Please download and complete the log at [ICHWC Coaching Log](#).
 2. Coaching sessions may not be with friends, family or classmates.
 3. Coaching sessions can be either paid or pro bono.
 4. Coaching log to includes coded identity, date and time, session number (e.g. 1, 2, 3 etc.) and coaching topics.
 5. In lieu of providing a coaching log documenting 50 sessions, applicants who are limited by their employer's regulations may submit a letter from their supervisor on company letterhead stating they have completed 50 health and wellness coaching sessions of at least 20 minutes in duration, and of which at least 75% of each session was devoted to coaching facilitation and not education.

<http://ichwc.org/individuals/>

*The Wellness Coach's Value Proposition**

“Thank you for your interest in improving your lifestyle and your life. You may be new to coaching, and especially wellness coaching, so let me share with you the value that it brings.

Wellness/health coaching is all about you living the best life possible for you. To do that most people find there needs to be some improvements in their way of living, their lifestyle. Making those improvements, those changes is challenging when you have to do it all by yourself. Perhaps you've already had some experience with that.

When I work with someone in coaching I'm here to serve you. You are the one in charge of your life and our work together. It's your hands on the steering wheel. I'm not going to tell you what to do and give you a pre-made wellness plan. But, together we can co-create a plan to help you succeed at making the lifestyle improvements that you want to make.

As your coach I will be working with you to get very clear about where you are at with your health and well being right now. We'll help you take stock of that by exploring together, using some coaching tools that will help give you a more complete picture, and by going over the lifestyle improvement recommendations you've gotten from treatment professionals. Then we'll work together to help you form a clear picture of the kind of life you want to live, your healthiest life possible for you. We'll compare where you're at and where you want to be and together form a solid plan to help you get there.

Once we have that plan we'll work together as allies to help you be accountable to yourself and follow through on the steps you need to be taking on a regular basis to help you achieve the goals you have in your plan. I'll be with you throughout the journey. I'll be there to help you strategize over, under, around and through the barriers that come up. I'll help you with challenges that make it tough for you to live the healthy life you want and together we'll help you keep on track. Together we'll help you find and develop the sources of support that will make your changes last. We'll evaluate our progress and adjust the course along the way as we need to. My goal is to assist you in becoming self-sufficient in your wellness, to be able to live a healthy life in a completely sustainable way.

I bring the value of a professional that knows about succeeding at lifestyle improvement. I bring the value of an ally.”

*(Created by Michael Arloski, Ph.D., PCC, CWP) Please adapt to your own words and use it! If used intact you must include authorship credit and contact information (web address) for Real Balance Global Wellness Services, Inc. www.realbalance.com



How To Give Feedback – for fellow students

When students do coaching practice “live” they benefit greatly from receiving feedback. This is a delicate situation because both the practice (such as “Fishbowl Coaching”) takes place in front of the whole class and the feedback process takes place there as well. Acknowledge that the practice we do in class is the hardest coaching they will ever do helps. They have no time to have a “Foundation Session” first, no time to build the relationship, they are just jumping into instant coaching!

The Feedback Process has three parts:

1. Observe and note
2. Provide Feedback
3. Process the feedback (Your instructor will handle this.)

OBSERVE AND NOTE

- Position yourself so you can see & hear the coach easily (even better than your view of the client).
- Keep paper notes in your own informal way.
- Focus on the coach, not the client. Really be a “keen observer”

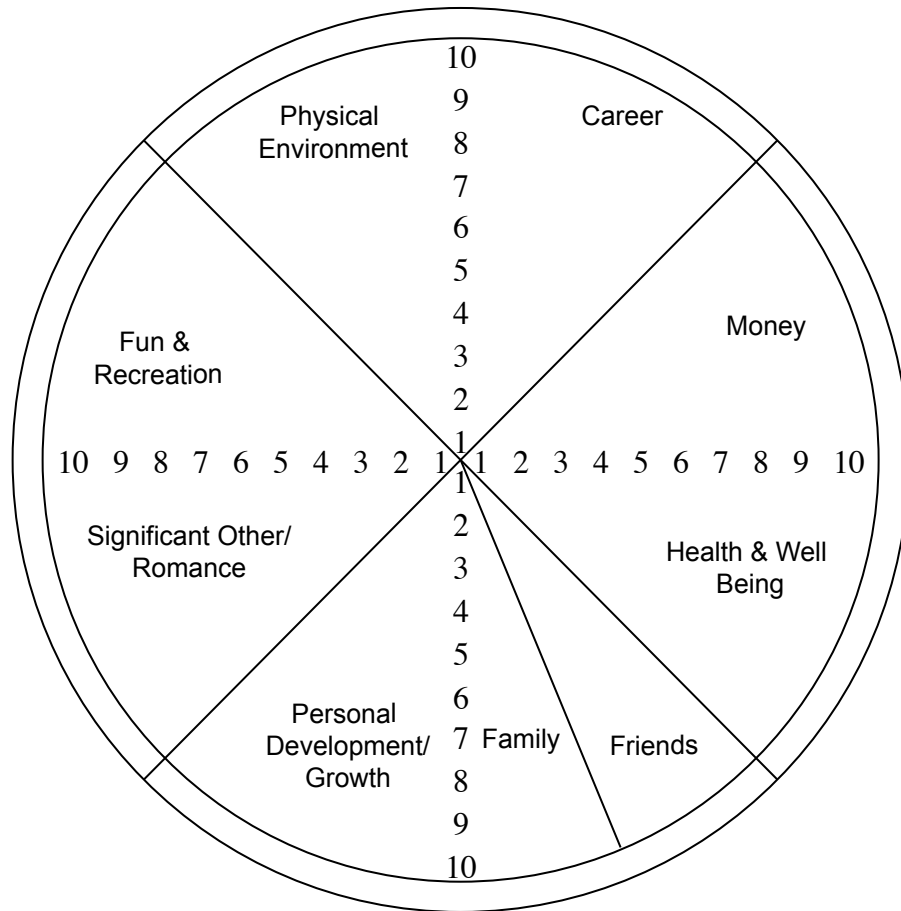
PROVIDE FEEDBACK

- Be Positive – Always use positive psychology and provide the positive feedback first. Identify what the student did effectively. Be very specific. Praise like you mean it!
- Focus on the coaching. Don’t get distracted by trying to “solve” the client’s problems.
- Share Observations not interpretations!
- Share your observations on how the coach balanced using both questions and active listening skills. New coaches often ask far too many questions.
- Attempt to identify the specific coaching skills you observed in use.
- Remember Coaching Presence - Give feedback on the degree to which the coach provided the Facilitative Conditions of Coaching. Soften this at times by acknowledging how hard it is to relax and be yourself when under the spotlight.
- Hold back on “I might have done it this way...” suggestions.
- Don’t be afraid to explore how the coach can improve. An effective way to approach this is by asking the coach questions about how they thought they could have done better. Ask them about times where they felt stuck, etc. Help them walk away with some concrete things to work on. (Your instructor will take the lead on this.)
- End on a positive note.



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The Wheel of Life in Coaching



Personal Life Wheel

Rank your level of satisfaction in each area of your life. The closer you are to 10, the more fulfilled you feel. Once you have marked your number in each area - connect each number forming a new outside perimeter for your circle.

- How smooth or bumpy is your life?
- Are there areas of your life that need attention?
- What areas of your life are you willing to address now, soon, later?

Readiness for Lifestyle Change

Michael Arloski, Ph.D.

Working With The Readiness for Lifestyle Change©

Use this Tool after you have created your Well Life Vision and have decided the areas of your life you want to focus on. Explore each statement and rate how true each statement is for you at this time in your life and then talk about them with your coach. Once you rate yourself for each statement add your numbers together to gain your total Readiness score.

Please respond to each question answering:

1= Not True 2 = Rarely True 3 = True at Times 4 = Mostly True 5 = Very True

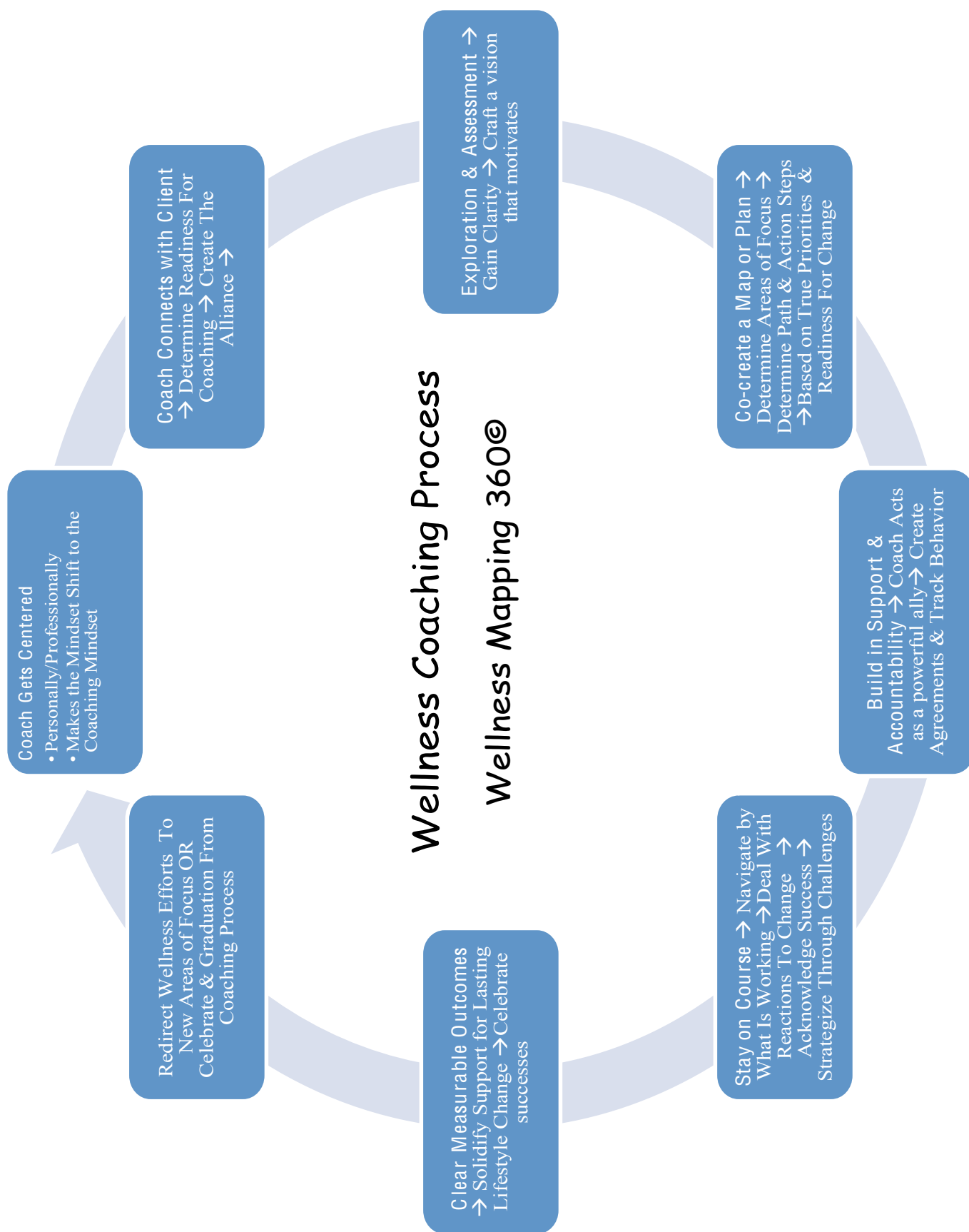
1. I am ready to make the changes needed in this area of my life.
1 2 3 4 5
2. I am capable of making the changes needed in this area of my life.
1 2 3 4 5
3. I believe making these changes will improve my life.
1 2 3 4 5
4. I have the resources and opportunities that will make this change possible.
1 2 3 4 5
5. Making the changes in this area of my life is worth the time and effort.
1 2 3 4 5
6. I have the time to invest in making the changes needed in this area of my life.
1 2 3 4 5
7. I am excited to make the changes in this area of my life.
1 2 3 4 5
8. I am fearful of what might happen if I do not make the changes in this area of my life.
1 2 3 4 5
9. My environment supports me in making the changes in this area of my life.
1 2 3 4 5
10. I am choosing to make the changes to this area of my life.
1 2 3 4 5

Please total your score for this section _____

Readiness - What does your score mean?

- 40-50 pts. High level of Readiness - *Congratulate yourself – you are ready to make the changes you have selected!*
30-39 pts. Moderate level of Readiness - *What would help you be more ready to make the changes you have selected?*
20-29 pts. Low level of Readiness - *Explore your answers with your coach – what is holding you back?*
Below 20 pts. Very low level of Readiness - *Explore your answers with your coach – consider choosing another focus area*

Based on research of Prochaska and Albert Bandura





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Wellness Mapping 360© Well Life Vision Tool

WM360© Well Life Vision Tool

Name:

Well Life Vision – Imagine your best. Relax in a comfortable place. Breathe deep and imagine what your life would be like if you were living it to the fullest, healthy, well and functioning at your very best?

What would you look like at your ideal level of wellness?

What are the key aspects of your vision?

What would you be doing more of?

What would you be doing less of?

Why is your vision important to you?

When in your life have you experienced aspects of your vision?

What do you value most in your life?

What strengths can you draw upon to achieve your vision?

My Well Life Vision: Either on your own or working with your coach, arrive at a statement that sums up your idea of what it would look like to be living your Well Life Vision. Be realistic and yet, inspiring!



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Well Life Focus Tool

Name:

FOCUSING YOUR WELLNESS EFFORTS

Current Life Status: - Take inventory of your current health & wellness With your Well Life Vision in both your mind and heart take a deep breath, relax and ask yourself “*What is my life currently like and what would have to change for me to achieve my well life vision?*” Do not be discouraged or judgmental with yourself – just be honest.

Areas of Focus: Focus your effort. To move towards your well life vision what areas of your life will you focus on? For maximum success, prioritize no more than five areas and make those areas the ones you are most ready to address. Suggested lifestyle improvements from healthcare providers and results from wellness assessments or health risk assessments can also be listed. Explore these areas of your life and your readiness to make changes with your coach.

1. _____
2. _____
3. _____
4. _____
5. _____

Area of Focus 1 - To achieve my well life vision I want and am ready to focus on the following area. You may choose this area because feel most ready to work on this area or that you need it the most, or you might choose it because it is easy and you just want to have a successful start.

Focus area:

A. Desires: What do you want or how would you like it to be? In your own words state your desires for this area in your life. What are the short and long term outcomes desired. (example, *I want to regain my ideal weight over the next 6 months. example, I want to lose ten pounds over the next 3 months*)

B. Current Location: Where do you see yourself currently in this area of your life? Describe how this area of your life is currently. List whatever describes your present situation. (example, *I am 25 pounds heavier than before being pregnant*)

C. The Path: What do you need to do? What needs to change in your life for you to accomplish your desire for this area in your life? State the changes needed as specifically as you can. *(example, I want to improve my diet and increase daily activity)*

D. Committed Path: What are you making a commitment to do? Work with your coach to create realistic and attainable action steps that will move you towards the desired outcome for this focus area. Choose an initial step that is easy and doable and that will get you moving. Like a map, chart your course to your chosen change. Work with your coach to arrive at strategies that are challenging enough without being too much.

- Be specific
- Write down what you will do and by when
- Write down how you will communicate your progress to your coach

Action Steps	Indicators of Success	Completion	Check-in method
Step 1.			
Step 2.			
Step 3.			

E. Challenges: What are you up against? List what obstacles are in your way or what you believe could prevent you from reaching your desired destination. *(For example: when under a work deadline I tend to stop doing anything for myself)*

F. Strategies To Meet The Challenges: Ways to overcome the hurdles.

With your coach develop strategies that you can use to make adjustments in your life to overcome or get around things that hold you back from your committed course of action. *(example: when under a work deadline I will make my exercise session briefer, but not skip it.)*

G. Sources of Support - Who can share this journey with you or support your journey?

State specifically who or what your sources of support, encouragement, and accountability are as you follow this area of focus on your wellness map into new territory?

Wellness Plan Tool

Date: _____

All aspects of our lives are connected and affect one another. As we work on our relationships the workplace feels the positive outcomes. As we build strength at the gym we also build confidence and inner fortitude to complete a job. Use the Wellness Map Form to chart your own success. It is the agreement with yourself that brings clarity to what you desire to accomplish and creates a reference for you and your coach. Use your Well Life Vision and Areas of Focus to guide the way.



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Name: _____ Coach: _____

Focus Area/ Goal	Readiness? (1-5 scale with 5 being the most ready)	Action Steps	Indicators of Success	Who will Support You?	Accountability	Completion
(Attain a healthy weight)	1.	1.	1.			
	2.	2.	2.			
	3.	3.	3.			
	1.	1.	1.			
	2.	2.	2.			
	3.	3.	3.			
	1.	1.	1.			
	2.	2.	2.			
	3.	3.	3.			
	1.	1.	1.			
	2.	2.	2.			
	3.	3.	3.			

Comments:

Focus Area: What you want to change or accomplish?

How ready are you? How ready are you to make the changes you have identified? Rate your readiness on a 1-5 scale with 5 being the most ready.

Action Steps: The steps that will walk you to your desired change.

Indicators of Success: These are the mile markers along your path to reaching your desired changes and Well Life Vision

Wellness Mapping 360[®]© Tools for Living Well

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Weekly Tracker & Review Tool

Week: _____

Next Coach Meeting: _____

1. Focus of Area / Goal: _____

2. Focus of Area / Goal: _____



Action Steps What I agree to do this week	Focus Area	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday	Completion? Yes / No	Progress Notes
Step 1)										
Notes:										
Step 2)										
Notes:										
Step 3)										
Notes:										
Step 4)										
Notes:										
Weekly Review:										
What have you accomplished this week?										
What challenges came up for you this week?										
What worked well for you this week?										

Action Steps: Actions steps walk you towards accomplishing your desired life change. Write down the Action Steps you committed to accomplish this week. Make each step small and specific.

Focus Area: These are the areas in your life that you decided to focus on and the lifestyle changes you desire. In this section write down the focus area the associated Action Step is moving you towards.

Days of the Week: When you complete an action step write it down under the day it was completed. Be specific and give yourself credit due.

Weekly Review: Answer the questions and review your week. Use what you learned this week to help plan for the upcoming week. What will you change? What will you add? What do you want to share with your coach?

The CONNECTION SCALE

Explore each statement below and rate (1-5) how true each is for you at this time in your life. Talk with your coach (or a friend) about your answers or write about the experience in your guided wellness journal. Once you rate yourself for each statement add your numbers together to gain your total connectedness score.

1 = Not True 2 = Hardly ever True 3 = Sometimes True 4 = True most of the time 5 = True

Connection to self

- | | | | | | |
|------------------------------------|----|----|----|----|----|
| 1. I enjoy spending time alone. | 1. | 2. | 3. | 4. | 5. |
| 2. I have enough time alone. | 1. | 2. | 3. | 4. | 5. |
| 3. I am compassionate with myself. | 1. | 2. | 3. | 4. | 5. |
| 4. I like who I am as a person. | 1. | 2. | 3. | 4. | 5. |
| 5. I like my body. | 1. | 2. | 3. | 4. | 5. |

Connection to nature and my environment

- | | | | | | |
|--|----|----|----|----|----|
| 1. My living space is comfortable and suits me. | 1. | 2. | 3. | 4. | 5. |
| 2. I spend quality time in nature. | 1. | 2. | 3. | 4. | 5. |
| 3. I have a place I go to for refuge or to recharge. | 1. | 2. | 3. | 4. | 5. |
| 4. My workspace is comfortable and suits me. | 1. | 2. | 3. | 4. | 5. |
| 5. I know my neighbors. | 1. | 2. | 3. | 4. | 5. |

Connection to family

- | | | | | | |
|---|----|----|----|----|----|
| 1. I have a supportive family. | 1. | 2. | 3. | 4. | 5. |
| 2. I enjoy spending time with my family. | 1. | 2. | 3. | 4. | 5. |
| 3. I spend enough time with my family. | 1. | 2. | 3. | 4. | 5. |
| 4. I feel connected to my family. | 1. | 2. | 3. | 4. | 5. |
| 5. I feel a connection to those who came before me. | 1. | 2. | 3. | 4. | 5. |

Social Connection

- | | | | | | |
|---|----|----|----|----|----|
| 1. I spend enough time doing activities I enjoy. | 1. | 2. | 3. | 4. | 5. |
| 2. I spend enough time with friends. | 1. | 2. | 3. | 4. | 5. |
| 3. I belong to a supportive community. | 1. | 2. | 3. | 4. | 5. |
| 4. I have someone I can share most everything with. | 1. | 2. | 3. | 4. | 5. |
| 5. I enjoy intimacy. | 1. | 2. | 3. | 4. | 5. |

Spiritual Connection

- | | | | | | |
|---|----|----|----|----|----|
| 1. I feel connected to something greater than myself. | 1. | 2. | 3. | 4. | 5. |
| 2. I spend time in a spiritual practice. | 1. | 2. | 3. | 4. | 5. |
| 3. I feel a sense of purpose in my life. | 1. | 2. | 3. | 4. | 5. |
| 4. I belong to a spiritual group. | 1. | 2. | 3. | 4. | 5. |
| 5. I am a spiritual being. | 1. | 2. | 3. | 4. | 5. |

Connection at work

- | | | | | | |
|--|----|----|----|----|----|
| 1. I get along well with my co-workers. | 1. | 2. | 3. | 4. | 5. |
| 2. I feel respected in the work I do. | 1. | 2. | 3. | 4. | 5. |
| 3. I am part of a team at work. | 1. | 2. | 3. | 4. | 5. |
| 4. I have adequate contact with others in the work I do. | 1. | 2. | 3. | 4. | 5. |
| 5. My colleagues and I trust one another. | 1. | 2. | 3. | 4. | 5. |

Total _____

Working With The Connectedness Scale

100 pts – 150 pts = High level of Connectedness – Wonderful, make good use of the support you have
 50 pts – 99 pts = Moderate level of Connectedness – OK, talk /write about your satisfaction with the level of support in your life. Consider adding to your Wellness Map
 1 pts – 49 pts = Low level of Connectedness – consider adding support systems to your life and your Wellness Map.

Self-Permission/Self-Denial Inventory *Michael Arloski, Ph.D.*

Working With The Self-Permission/Self-Denial Inventory©

Explore each statement and rate how true each is for you at this time in your life and then talk about your answers with your coach. Once you rate yourself for each statement add your numbers together to gain your total score in each separate section.

Please respond to each question answering:

1= never 2 = seldom 3 = occasionally 4 = often 5 = always

Self-Permission

1. When an opportunity to have fun with others comes up I allow myself to join in and participate.
1 2 3 4 5
2. When I have "free time" I engage in an activity I truly enjoy.
1 2 3 4 5
3. I accept gifts & compliments easily and graciously.
1 2 3 4 5
4. I make use of massage therapy and/or related professions for my own self-care.
1 2 3 4 5
5. When an opportunity to have fun on my own comes up I allow myself to do so.
1 2 3 4 5
6. I allow myself to take time to relax (in whatever way I like) on a regular basis.
1 2 3 4 5
7. I take "time out" from tasks I am working on to relax and refresh myself.
1 2 3 4 5
8. I allow myself time to exercise on a regular basis.
1 2 3 4 5
9. I plan recreational activities or outings to happen at least once a month.
1 2 3 4 5
10. I maintain active involvement in at least two of my favorite hobbies/interests/sports, etc. (such as music, hiking, nature study, gardening, etc.)
1 2 3 4 5

Please total your score for this section _____

Self-Permission - What does your score mean?

- 40-50 pts. High level of Self-Permission. Congratulate yourself!
30-39 pts. Moderate level of Self-Permission. OK, could be even better.
20-29 pts. Low level of Self-Permission. Identify where to work more on Self Permission.
Below 20 pts. Very low level of Self-Permission – Be more compassionate with yourself.

Working With The Self-Permission/Self-Denial Inventory©

Explore each statement and rate how true each is for you at this time in your life and then talk about your answers with your coach. Once you rate yourself for each statement add your numbers together to gain your total score in each separate section.

Please respond to each question answering:

1= never 2 = seldom 3 = occasionally 4 = often 5 = always

Self-Denial

1. I take work home with me to complete, or do additional work in the evenings.

1 2 3 4 5

2. I feel guilty when I take time just for me.

1 2 3 4 5

3. I decline invitations to recreate and have fun with others.

1 2 3 4 5

4. I put the needs of other people ahead of my own.

1 2 3 4 5

5. Work comes first.

1 2 3 4 5

6. At the end of the year I have more than seven unused vacation days, or (if self-employed) I have vacationed a total of seven days or less all year.

1 2 3 4 5

7. It is difficult for me to relax, unwind, and just “do nothing”.

1 2 3 4 5

8. Shopping for items I do “want” but aren’t a necessity is difficult for me.

1 2 3 4 5

9. I do not set time boundaries on when I attend to work/business matters.

1 2 3 4 5

10. I use vacation and/or weekend time to complete household tasks/demands.

1 2 3 4 5

Please total your score for this section _____

Self-Denial - What does your score mean?

40-50 pts. High level of Self-Denial – Be more compassionate with yourself.

30-39 pts. Moderate level of Self-Denial – Identify where to work on less self-denial.

20-29 pts. Low level of Self-Denial – OK, could be even better.

Below 20 pts. Very low level of Self-Denial – Congratulate yourself!



Milestones Reclaiming Tool

Historically milestones have been used to “mark the way” to one’s destination, often letting you know how far you have come, or how far you have to go. Use this tool to help you understand where you are at on your own reclaiming journey. Let them help you to be successful at getting to your destination.

List (in no particular order) personally meaningful/fun/rewarding activities that you used to do, but have not done since your health challenge appeared. (Examples: dancing, bicycling, having sex, visiting friends, air travel)

- 1.
- 2.
- 3.
- 4.
- 5.
- 6.
- 7.

Choose 5 activities from the list above and rate them using the following scale.

Activity 1. _____

Doing this activity again will is:

Medically not possible A big challenge Possible Doable Likely

How important is reclaiming this activity as part of your life?

Not important Some what important Important Very important Extremely important

Notes:

Activity 2. _____

Doing this activity again will is:

Medically not possible A big challenge Possible Doable Likely

How important is reclaiming this activity as part of your life?

Not important Some what important Important Very important Extremely important

Notes:

Activity 3. _____

Doing this activity again will is:

Medically not possible A big challenge Possible Doable Likely

How important is reclaiming this activity as part of your life?

Not important Some what important Important Very important Extremely important

Notes:

Activity 4. _____

Doing this activity again will be:

Medically not possible A big challenge Possible Doable Likely

How important is reclaiming this activity as part of your life?

Not important Some what important Important Very important Extremely important

Notes:

Activity 5. _____

Doing this activity again will be:

Medically not possible A big challenge Possible Doable Likely

How important is reclaiming this activity as part of your life?

Not important Some what important Important Very important Extremely important

Notes:

Now, identify your **three most important and doable activities**.

1) _____

2) _____

3) _____

Next list your first activity that you want to reclaim and **identify three milestones** that will be “markers” or steps along the way towards completing the task of doing that activity again.

Example:

1. Activity = bicycling

Milestones along the path toward my goal:

1. Get in good enough shape to receive my doctor’s permission to bicycle
2. Finish at least half of my rehabilitation sessions
3. Find someone to bicycle with and set a date

Example:

2. Activity = hiking in mountains

Milestones along the path toward my goal:

1. Walk one mile on flat ground
2. Hike to top of a small hill
3. Hike to top of challenging hill

My Milestones



Activity #1

Milestones along the path toward my goal: Date I reached it!

- 1.
- 2.
- 3.

Notes:



Activity #2

Milestones along the path toward my goal: Date I reached it!

- 1.
- 2.
- 3.

Notes:



Activity #3

Milestones along the path toward my goal: Date I reached it!

- 1.
- 2.
- 3.

Notes:

Observer Form (modified)

Client:
Coach:

Date:
Observer:

The coach:	1	2	3	4	5
	Not	Sometimes	Regularly	Established	Well
<u>[CC= Core Competency]</u>	<u>Observed</u>		<u>About 1/2</u>		<u>Integrated</u>
Creates and sustains rapport with client [CC#3] 5	1	2	3	4	
Consistently demonstrates active listening [CC#5] Nonverbally.	1	2	3	4	5
Consistently demonstrates active listening [CC#5] Skills (Paraphrase, Reflect Feeling, Request For information, etc.)	1	2	3	4	5
Summarizes and reflects back to client appropriately [CC#5]	1	2	3	4	5
Assists the client to create new awareness [CC#8] 5	1	2	3	4	
Consistently uses open-ended questions [CC#6]	1	2	3	4	5
Consistently has a good blend of ?'s and other skills	1	2	3	4	5
Uses silence as a tool to enhance the coaching process [CC#4]	1	2	3	4	5
Asks permission to suggest or try something new (CC#3)	1	2	3	4	5
Consistently responds in a non-directive manner;	1	2	3	4	5
Assists client to set clear and doable intentions [CC#9 & 10]	1	2	3	4	5

What the coach did well:

Suggestions for things to do differently and observed growing edges

Coach Notes

Name:	Client commitment/agreement from <u>previous</u> session (taken from last week's progress notes):
Date:	

Client stated direction or agenda for this session (direction for discussion based on client's current agenda.):

Progress Notes	
Connect/ Review	
Tools / Techniques	
Opportunities	
Challenges	
Accountability	
Support	
Client commitment / agreement for next session:	
	Review/evaluation (key points from session, what worked and what did not, modifications for next session, etc.):

Program Details and Opportunities

Wellness & Health Coach Certification Requirements: *Wellness Mapping 360°™ Methodology*

- Completion of the 32 contact hours of training
- Completion of final exam: *A link to the exam will be sent to you after completion of the 32-hour training.*
- **Buddy Coaching:** *During your training you will be matched with a Buddy Coach. You will spend time during class and after class getting to know one another and practicing your wellness coaching skills. You will need to complete a minimum of 5 buddy-coaching sessions outside of class and submit of coach notes as documentation of the wellness coaching process to Deborah@realbalance.com. The guidelines are in the back of your manual and Coach Notes Form is in your Toolkit.*
- **Case Study:** *Using a client, or volunteer you must complete a minimum of 6 sessions and write a case study documenting the process. The case study demonstrates that you have the knowledge and the skills to apply the Wellness Mapping 360° model of Wellness Coaching. You will find the Case Study form and more information about the case study in your toolkit and in the appendix A of Wellness Coaching manual.*
- **Audio Recording:** *Please submit a recording of a wellness coaching session that is 20-35 minutes in length and not the Foundation or the Final session. For your growth we will provide a written practical skills assessment of your coaching. To receive the ICF Approved Coach Specific Training Hours you will need to submit an additional recording for review and there is an additional fee for this.*

Our “Core” Wellness & Health Coach Certification Program is a 32 -hour certification process. The program is designed to educate and certify health, fitness, and mental health professionals as wellness and health coaches. To ensure continued growth of the wellness coach the Wellness Mapping 360°™ Wellness & Health Coach Certification is renewable every two years with twenty Continuing Education Hours in a related field and a small processing fee. *Completion of this program will allow you to apply to the ICHWC.org to sit for the national exam during the transition phase. For More information email Deborah@realbalance.com or ask your instructor.*

Student / Wellness Coach Alumni: We have a portion of our website that is reserved for students and our wellness coach alumni. You will find current articles, resources, webinars, and the latest instruments, forms, and tools. To access this portion of our site you will need to register and be approved. **Class Forum:** A forum will be created on the www.realbalance.com website for your class. It is place where class participants can share and ask questions as well as a place where your instructor can communicate directly with you. Once we have you registered as a Student / Wellness Coach Alumni you will be able to access the Forum. You will receive more information about this and how to register at the site shortly after your training intensive.

Tools and Forms:

You have just received the latest Wellness Mapping 360°™ Tool Kit. The tools are templated to protect the integrity of the tool. When you use a tool with a client save the Completed Tool in a file format that works for your filing system and possibly to include their name. **Example:** Well Life Vision.xls (template) would be saved as “Pat Smith Well Life Vision.xls.” It is also possible to have your name and logo dropped on each of the forms/tools for a nominal fee. Deborah@realbalance.com for information on this. We are always updating and adding to the tool kit so stay in touch. Let us know if you have ideas for improvements or additional tools – we are always listening. Though the Wellness Mapping 360°™ Wellness & Health Coach Certification is a trade-marked program and holds the copy right for the materials. Feel free to use the articles and presentations in building awareness of Wellness Coaching and your personal business. Once you complete the Certification process you will receive another cd with usable logos, your Certification Seal and information on how to link to our site etc. We want to provide you with what you need to succeed just leave our copyright information on the bottom.

Newsletter: Please register for our “Wellness Coaching News” on our website homepage (lower right). We send out 10 issues a year with valuable information on wellness coaching and many topics pertaining to the work we all are involved in. If you have a topic of interest and like to write we are always looking for people to help-out.

Free Webinars: Dr. Arloski hosts free 30-minute Lunch & Learns topical webinars once a month, 10 months of the year. In these talks Dr. Michael speaks on topics relevant to health & wellness topics and interviews of interesting people. If there are topics you are interest in hearing more about let us know. If there are people you feel should be interviewed let us know. We post the upcoming Webinars on our website homepage and in our Newsletters. We Post the recorded Webinars in the Resource Section of our Student / Coach Center portion of our Website.

If at anytime you have difficulty or questions please contact Deborah – 1-866-568-4702 toll free or Deborah@realbalance.com

Case Study Guidelines

The intention of the case study is:

1. Primarily to show evidence of your understanding and ability to apply the Real Balance Wellness Mapping 360 methodology.
2. Show evidence of the application of Real Balance tools and, as applicable, other tools to assess, explore, design a wellness plan or map, facilitate learning and arrive at outcomes.
3. Demonstrate your awareness of the ICF core competencies: Setting the Foundation, Co-Creating the Relationship, Communicating Effectively and Facilitating Learning and Results; and the ICHWC competencies: Coaching Structure, Coaching Process (Relationship/Communication/Techniques), Health & Wellness concerns, Ethics/Legal concerns.

You are not expected to be an expert. We do expect that you have learned and can utilize the 5-stage methodology facilitated by tools and the methodology structure. Before you begin please refer to the ICHWC Code of ethics and the ICF Core Coaching Competencies.

Required number of coaching sessions: six coaching sessions are required to complete the case study. You and your client may also choose to extend the coaching beyond six sessions; or you may continue to meet with your client following completion of the case study.

Client Definition: for our purposes a “client” is defined as someone with whom the coach has a neutral relationship and is NOT:

1. Involved in an intimate relationship with;
2. An immediate family member (spouse, partner, parent, child, sibling, etc.);
3. Involved in a relationship of unequal power (such as a manager, supervisor, employer, etc.).
4. A close personal friend or someone with who you do not feel you can remain impartial. (ICHWC excludes friends as clients).

The client may or may not be paying for coaching services. Whether the client is paying or not, it is highly recommended that you obtain a commitment from a prospective client to meet for six sessions before you begin. It is possible to create a barter with the client, wherein the client receives wellness coaching services in exchange for a commitment to six coaching sessions.

Completion Due Date: the case study is due up to six months from the last webinar or training day of your Health and Wellness Coach Certification training class.

Wellness Coaching Emphasis: for the purpose of demonstrating your competency in health and wellness coaching, the focus must be on some form of lifestyle improvement and/or medical compliance concern. This is subject to the discretion of the instructor.

Length, Format & Content: There are two components. The **Case Study form** outlines the written structure for your case study and is required. The case study must be a minimum of 3 pages single spaced not including the case study form in the total (or equivalent with alternate spacing).

Passing Score & Case Study Marking Criteria: the minimum passing grade for the case study is 75. Please refer to the **Case Study Marking Criteria** for guidance on how the case study will be scored and what the reviewers will be looking for and assessing.

Case Studies Will Be Sent Back if:

- They do not meet the presentation, organization and structure requirements including.
 - The document does NOT have the coaches name on it.
 - Case Study is not a minimum of 3 pages single spaced (criteria and guidelines set forth above)
 - The case study client is determined to be inappropriate. (criteria and guidelines set forth above)
 - The Case Study is not submitted by the assigned date (extension is permitted).
- Consulting or education dominates the focus of the client sessions. ICHWC requires not more than 25% education.
- Harm’s Way – the case study describes a process that is hurtful, lays blame or fault on the client or otherwise appears to result in a negative client experience.

Case Study Form

Please use the following outline to develop your case study.

Your name, email address, telephone number and the Real Balance class you attended (dates & webinar or dates & location).

Description of the Client. Consider:

- Age
- Family and other relationships
- Job and its effect on the person
- How did the person come to coaching?
- What support systems does the person have?
- What is the presenting problem or why the person began coaching?
- What are any health and wellness concerns?

I. Describe the ways you went about *Setting the Coaching Foundation & Creating the Alliance* with your client. Include:

1. Meeting ethical guidelines and professional standards as set forth by the International National Consortium of Health and Wellness Coaches (ICHWC) that can be found at: www.ichwc.org
2. How you went about conducting the Foundation Session and establishing agreements with your client; i.e. using the **Welcome Packet** or something similar to learn about your client.
3. Describe what you did to Co-Create the relationship with your client.

II. Describe the ways you went about *Setting the Wellness Foundation* with your client.

1. How you gained awareness your client's wellness concerns.
2. How you gained awareness of any medical/health concerns.
3. How you gained awareness of any medications, treatments or other forms of current health care.
4. How you gained awareness of the lifestyle prescription from the treatment team.

III. Describe the ways you went about *Facilitating Learning and Results – Designing the Integrated Plan* with your client. Describe:

1. How you co-created the **Well Life Vision** with your client.
2. How you co-created the **Integrated Wellness Plan** and assessed **Readiness for Change** with your client. The **Case Study Plan chart** may be referenced here.
3. What tools you used to facilitate identification and development of the above.

IV. Describe the ways you went about *Facilitating Learning and Results – Establishing Accountability, Exploring Support, Evaluating and Identifying Outcomes*. Consider:

1. How you built accountability into the wellness plan.
2. How you assisted the client in being accountable to themselves.
3. Exploration regarding support.
4. If and how you evaluated with the client their experience at the end of the six sessions.
5. How you identified outcomes with the client.

V. Describe the ways in which you *Communicated Effectively* with your client. Consider:

1. Active listening skills you used.
2. How you used powerful questions.
3. How you integrated switching hats, making suggestions, or education, if applicable.

Examples enhance the reviewer's ability to assess how you used these skills.



1. How you helped your client to gain awareness.
2. If you addressed negative self-talk.
3. How you facilitated your client stretching themselves.
4. How you used additional tools of exploration.

VII. As our clients learn from us we also learn from them. What insights have you gained through the experience of working with your client in this case study? Consider:

1. Your own self-observation - how you stretched as a coach.
2. What you learned through doing that reinforced classroom learning or surprised you.
3. What insights and key learnings did you gain about yourself personally and professionally?

OVERVIEW OF THE PRACTICAL SKILLS ASSESSMENT

WHAT IS THE PURPOSE OF THE PSA?

This Practical skills Assessment (PSA) is intended to:

1. Provide you with an evaluation of your coaching skills along with feedback on your strengths and areas for improvement.
2. Meet the International Consortium for Health and Wellness Coaching (ICHWC) requirements for having evaluated the coaching skills of candidates who apply for the ICHWC exam.
3. Completion of the Real Balance CWHC certification requirements.

It is necessary to pass the PSA in order to complete the certification requirements with Real Balance GWS and to apply to sit for the ICHWC exam.

WHO WILL EVALUATE YOUR PSA?

Your PSA will be reviewed by a Real Balance faculty member who meets specified credentials and qualifications in the field of coaching. These include International Coach Federation (ICF) certification at the level of Professional Certified Coach (PCC) or above; ICF approval and credentialing as a *mentor coach*; International Consortium for Health and Wellness Coaching (ICHWC) approval and designation as a *health and wellness mentor coach*; and professional certification as a health and wellness coach (CHWC) through an ICHWC approved program.

WHAT ARE THE REQUIREMENTS FOR THE PSA?

1. Coaching session recordings **may not be** with friends, family (including extended family), classmates or buddy coach, or someone involved in a relationship of unequal power (such as a manager, supervisor, employer, or supervisee, employee, report, etc.).
2. The recording may be with your case study client.
3. Coaching sessions may be paid or pro bono.
4. Each coaching session must be a minimum of 20 minutes in duration and no longer than 35 minutes.
5. The session recorded may not be the 1st or last session with the client. We want to assess your coaching in an 'on-going' session. 'On-going' sessions are those in which you are not setting the foundation, conducting initial assessment, or concluding and evaluating the coaching experience with your client.
6. Coaching must be facilitated in person, by phone or using live interactive technology such as FreeConferencecall.com or Skype.
7. The session should be submitted in the form of MP3. If you have another format that you would like to use, please check with the Real Balance office.
8. The session recording must be uploaded and submitted through the following file transfer link: <https://realbalance.com/file-transfer>. Please note that if sessions are submitted that are longer than 35 minutes, the reviewer will only listen to the first 30-35 minutes of the recording, and it will be evaluated on the basis of those 35 minutes.

WHAT WILL BE EVALUATED?

Some coaches who go through our program have had prior coaching training and/or experience; others are just beginning their coaching journey. The Real Balance training includes making the mindset shift, core coaching skills (active listening, open-ended questions), promoting awareness, requesting action and establishing accountability. We do not expect everyone to be master coaches; rather we are looking for basic competency in the core coaching skills that should be present at any level of experience.

Core Coaching Skills: the reviewer will be listening for essential coaching skills that are expected in every coaching session. These include how you establish rapport with your client; how you structure the session; demonstration of adequate exploration, active listening, use of open-ended questions, balancing between questions and active listening, and how well you promote awareness. The reviewer will be listening for the client's identification of clear and doable action steps and how accountability is established. Finally, the reviewer will be listening for how well you maintain the coaching mindset.

The reviewer will listen for any additional coaching skills that may be applicable or pertinent to the recorded session. These skills may not be called for or pertinent to every coaching session and/or maybe more advanced skills. You will not be penalized if you do not display more advanced coaching skills.

- **Additional Important Coaching Skills, if Applicable:** If the coach makes a suggestion or switches hats during the session, the reviewer will assess if the coach asked permission to make suggestions or when switching hats. If medical concerns or emotional concerns (especially anything identified on the ICF Top 10 Reasons to Refer List) are present, the reviewer will listen for exploration around a referral.
- **Additional Advanced Coaching Skills** include exploration of values and vision, building client self-efficacy, exploring negative self-talk, following the client's energy, use of strategizing and brainstorming, and exploration of different perspectives/reframing.

HOW WILL THE REVIEWER SCORE THE SESSION?

The reviewer will use the *PSA/Practical Skills Assessment Form*. There are six categories of “Essential Requirements” and 11 different additional coaching skills listed. Each item in the *Essential Requirements* will be scored: *Not Demonstrated*, *Not Yet Competent*, *Competent*, or *Skillful*. Each demonstrated skill level has a related score; the scores will be totaled to arrive at the Essential Requirements total score. (Please refer to the *PSA/Practical Skills Assessment Form*). The additional coaching skills will be scored separately, and a grand total score will be calculated.

What Will Not Be Accepted?

If any of the following condition apply, you will be requested to resubmit your PSA:

1. **Ethical or Legal Exception:** Please refer to the ICHWC Code of Ethics and Scope of Practice. If the reviewer hears anything in the recording that appears to be unethical or which violates possible legal concerns, the student will be notified and requested to resubmit a recording.
2. **Consulting/Educating/Treatment/Not Switching Hats Dominates the Session.** We follow the ICHWC requirement for the PSA that “at least 75% of the session is devoted to coaching facilitation and not education.” If the session appears to have a predominantly consulting, treatment or other professional focus, you will be notified and requested to resubmit a recording. This includes sessions that appear to be conducted primarily in the expert role even if some coach-like interaction is exhibited.
3. **Harm’s way:** the definition of ‘Harm’s Way’ includes but is not limited to:
 - When personal issues may impair, conflict with or interfere with the coaching performance or professional coaching relationships and the coach fails to seek out relevant professional assistance to determine the action to be taken, including whether it is appropriate to suspend or terminate the coaching relationship.
 - Providing medical, nutritional, mental health or other suggestions or advice that is out of scope of the coach’s qualifications, certifications and/or licenses and credentials.
 - Advocating alternative health care that is out of scope of the coach’s professional certifications, licenses and credentials.
 - Working with clients with identified serious medical diagnoses who refuse medical care and/or follow-up and/or do not indicate that they have received medical approval/clearance for an action plan (e.g., exercise, eating, etc.) where there may be a potential medical contraindication.
4. **Conflict of interest:** is defined by either the ICHWC or the ICF definition.
 - The ICHWC defines conflict of interest as “a situation in which a coach has a private or personal interest sufficient to appear to influence the objective of his or her professional role or responsibilities as a coach, faculty, or mentor.”
 - The ICF defines conflict of interest as “A situation in which a coach has a private or personal interest sufficient to appear to influence the objective of his or her official duties as a coach and a professional.”

ARE THERE ANY OTHER REASONS WHY I MAY NEED TO RESUBMIT MY RECORDING?

1. If a recording cannot be opened or because of the poor quality of the recording it is extremely difficult to listen to and therefore assess, it will be returned. This is an extremely rare situation.
2. If the recording is less than 20 minutes it will be returned.

WHEN WILL I KNOW IF I PASSED OR NEED TO RESUBMIT MY RECORDING?

Your PSA will be reviewed and you will be notified of your score and provided with written feedback within 4 to 5 weeks of submission.

WHAT CAN I DO TO BE SURE THAT MY RECORDING REFLECTS MY SKILLS MEETS THE CRITERIA REQUESTED?

There are several things that you can do.

Your Client/Coach Relationship: make sure you select a client with whom you have a primary coaching relationship.

Recording Time: you must have permission from your client to record the session. When you obtain permission from your client also let them know and obtain agreement regarding the required length of the recording so that both you and your client are prepared for the time requirement and time limit.

Core Coaching Skills & Session Structure: review the PSA form ahead of time. Listen to your recording before submitting it. Does it meet the essential requirements?

Additional Coaching Skills: If you make suggestions to your client or switched hats during the session, listen to the recording before submitting it. Did you ask permission? Was it clear to the client when you were switching hats? Was more than 25% of the session devoted to your expert role?

Before you conduct the recording, try out the equipment you’re using to ensure adequate auditory clarity, sufficient volume and any ambient noise.

After you complete the recording, listen for at least the beginning part of it to ensure adequate auditory clarity, sufficient volume and any ambient noise.

Relax, and use this as an opportunity to hone your skills. We want you to be the best health and wellness coach you can be and we want to help you get there!

NOTES

[illegible]



WELLNESS MAPPING 360°_{TM}

METHODOLOGY