

Case Study Marking Criteria & Feed-Back Sheet



Date:

Coach Name:

Reviewer Name:

Check the items that are true.

- The document has the name of the coach submitting the case study.
- Case study is a minimum of 3 pages single spaced (or equivalent with alternative spacing)
- Case study client is appropriate.
- Case study shows no evidence of putting client in Harm's Way.

(If any of the above are not checked please send back to student)

Elements being Assessed	Available Scores	Scoring Breakdown	
Presentation, Organization and Structure of Case Study			
Presentation, organization & structure of the case study	10	/5	Coach uses the Case Study format and guidelines provided.
		/5	Writing style is clear and well organized. Information is presented in a clear, logical order.
Setting the Foundation, Co-Creating the Relationship – Assess & Explore			
Coach shows evidence of:	10	/3	Meeting ethical guidelines (defined in the ICHWC or ICF Code of Ethics & Professional Standards).
		/2	Establishing coaching agreements with the client.
		/2	Using language in the case study that reflects the coaching mindset.
		/2	Allowing the client to tell their story.
		/1	Conducting the foundation session with your client using the Welcome Packet or something similar to learn about your client.
Setting the Health & Wellness Foundation – Assess & Explore			
Coach shows evidence of:	10	/4	Gaining awareness of the client's medical status, including any medications, diagnoses & any medical conditions/challenges, and treatment providers involved. Gain awareness of Lifestyle Prescription from the treatment team.
		/1	Using tools to explore client values, strengths, etc.
		/2	Gaining awareness of a typical week (their usual behavior) in the life of the client (specific to their wellness or medical concerns).
		/3	Gaining awareness of the client's lifestyle improvement desires.

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Facilitating Learning and Results – Co-Create the Wellness Plan or Map			
Coach shows evidence of:	20	/3	Co-creating the Well Life Vision with the client.
		/3	Identifying with the client the area(s) of focus.
		/3	Identifying with the client their stage of readiness for the specified area(s) of focus.
		/3	Assisting the client to set clear goal(s) that are realistic and doable within the 6 sessions that are in line with the area of focus and Readiness for Change.
		/3	Assisting the client to set clear action step(s) for each goal that are also realistic and doable within the 6 sessions.
		/5	Uses tools to facilitate development of the Wellness Plan such as: <ul style="list-style-type: none"> • Well Life Vision tool or Vision Board • Wheel (i.e. Wheel of Life, Wheel of Nutritional Satisfaction, Other) • Readiness for Change • Well Life Focus tool Well Life Plan tool Tracking tool Milestone tool
Facilitating Learning and Results – Establish Accountability, Explore Support, Evaluate & Identify Outcomes			
Coach shows evidence of:	15	/4	Building accountability into the wellness plan.
		/4	Assisting the client in being accountable themselves, not the coach.
		/3	Exploring support needs and gaps with the client/facilitates building in support.
		/2	Evaluating with the client at the end of the 6 sessions.
		/2	Identifying outcomes with the client.
Communicating Effectively – Active Listening, Powerful Questions, Direct Communication			
Coach describes evidence of:	15	/5	Using active listening (i.e., restatement, paraphrasing, reflection of feeling, silence, intuition, request for clarification, bottom lining, summarizing, acknowledgment, celebrating success, etc.).
		/3	Asking questions that evoke discovery and insight.
		/3	Asking open-ended questions.
		/4	Asking permission to offer a suggestion, educate, insert or try something new or to 'switch hats' from coach to expert role.
Facilitating Learning and Results – Creating Opportunities for Learning and Moving Forward			
Coach describes evidence of:	10	/5	Facilitating client self-awareness and/or addressing negative self-talk and/or turning failure into learning/exploring different perspectives and/or encouraging client to stretch within their tolerance zone.
		/5	Using tools to promote awareness as applicable such as: <ul style="list-style-type: none"> • All Real Balance tools of exploration • Other non-Real Balance tools to assess/identify values, strengths, etc.
Growth as a Coach			
Coach demonstrates evidence of:	10	/3	Ability to self-observe.
		/3	Learning as a coach through self-reflection.
		/4	Key learnings and development that affected the coach personally and professionally.
Overall Score & Feedback	100		

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Feedback:

What the wellness coach did well:

Suggestions to consider, try, and possibly do different when wellness coaching:

Recommendations for the coach's professional growth: