



UNC GREENSBORO

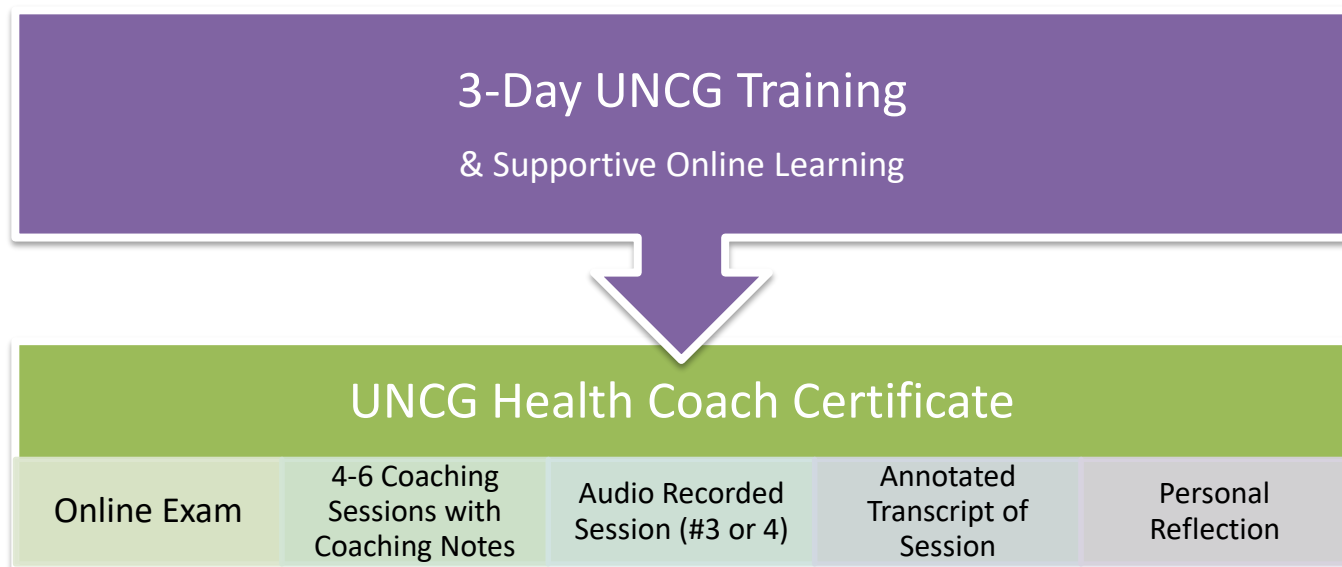
Health Coaching Programs

**Level 1: Foundations of Health Coaching
Certification Requirements**

TABLE OF CONTENTS

UNCG Health Coach Training Overview.....	3
UNCG Health Coaching Certificate Requirements.....	3
Online Exam	4
Coaching experience.....	4
Reflection of Coaching Experience	4
Submitting an Audio Recording of Your Coaching.....	5
Requirements for the audio recording:	5
General Tips for your audio recordings:	5
Submitting a Transcript of the Audio Recording	6
Example: Coding a Transcript – Meets Expectations	7
Example: Coding A Transcript – Does Not Meet Expectations.....	10
Example: Reflection for UNCG Health Coach Training Certificate	13
Tool: Coaching Notes	15
Example: Coaching Notes	16
Form: Verification of Coaching Experience	18
UNCG Health Coach Certificate Rubric	19
UNCG Certificate Plan	22

UNCG HEALTH COACH TRAINING OVERVIEW



UNCG HEALTH COACHING CERTIFICATE REQUIREMENTS

To receive the completion certificate as a Health Coach from the Department of Public Health at the University of North Carolina at Greensboro, you will need to satisfy the following requirements:

- ☐ Attend the entire 3-day Health Coach Training (Level 1)
- ☐ Pass (70% or higher) the online exam
- ☐ Complete your coaching experience (*6 sessions if you completed the training before October 30, 2020, **OR** 4 sessions if you completed the training after October 30, 2020*)
- ☐ Accompanying required documents:
 - Verification of Hours Form
 - Coaching Notes
 - Audio Recording
 - Session Transcription with personal reflection/comment added
 - Coaching Reflection statement
- ☐ Upload materials through [UNCG Box portal](#)

Each of these steps is further explained below.

ONLINE EXAM

Your test link was emailed to you directly following your training.

- Test questions will cover:
 - Material learned in training
 - Material from our readings
 - General health and wellness knowledge
- It is open-book and has no time limits
- It must be completed alone

COACHING EXPERIENCE

1. Find a coaching client that:
 - Is comfortable having notes and a recorded session sent in for review
 - Is **not** a close friend or family member

We find that the best “buddy coaches” are other training participants and highly suggest networking with one another to practice your coaching.

2. Verify your coaching hours
Use the form attached on page 17 to keep track of your hours. The first session should be at least one hour, the next sessions should be at least 30 minutes each
3. Complete coaching notes for the four-six sessions.
See page 14 for a notes template and page 15 for an example of coaching notes
4. Record one coaching session
See tips & requirements below (pages 5-6)
5. Transcribe this coaching session
Transcription should include your personal notes on the coaching spirit. See page 6 for further explanation and page 7 for examples

REFLECTION OF COACHING EXPERIENCE

The reflection should:

- Include brief summary your personal thoughts about your experiences as a coach.
- Discuss any components you feel you did not effectively address in your transcript
- Address the following components of the coaching framework: coaching spirit, communication strategies, application of behavioral theories, creating the alliance, exploration, and setting agreements/action planning.
 - a. How do you feel about your coaching abilities in these areas?
 - b. What development or growth have you noticed about your personal coaching abilities?
 - c. Where are you excelling?

- d. Where do you feel you could use room for improvement?
 - e. What are your goals for continuing to improve your coaching abilities?
- *See page 12 for a sample reflection. There is not a maximum page limit for reflections, it should be as long as necessary to address each component*

SUBMITTING AN AUDIO RECORDING OF YOUR COACHING

Requirements for the audio recording:

1. You must obtain permission from your client to record the session. Notify your client that the audio recording will be used solely for the purpose of receiving an evaluation of your coaching skills.
 - a. Consent should be obtained on recording, we suggest you ask them to state “I consent to be recorded for evaluation purposes”
 - b. Audio recordings should not include the use of a client’s full name or any other identifying information.
2. Your audio recording must be of an individual coaching session with a real client.
 - a. Role-plays will not be accepted to fulfill this requirement. Examples of role plays include the reading of a script or having an actor/friend/coworker pretend to be an actual client.
3. For submission, your audio clip must be a full session & a minimum of 30 minutes in length.
 - a. The audio recording should be a continuous recording, with no stopping, editing or interruptions of recording.
4. The audio recording should be clearly audible. We must be able to clearly hear both your voice and the client’s voice. Inaudible recordings will be returned as unacceptable.
5. Audio clips must be submitted in mp4 formats.

General Tips for your audio recordings:

- The audio clips will be evaluated for competency of your coaching skills as well as evidence of the coaching spirit. It is within your best interest to record a session after meeting at least twice.
- Choose a quiet space to conduct the session for recording. Background noise could be a distraction or hinder the quality of the audio.
- We suggest recording multiple sessions and submitting one that best demonstrates your coaching skills and abilities

- We suggest trying to email yourself and double checking the audio recording before sending it in – this can help prevent technical errors that would delay your submission process.
- **Do not delete** the audio until we have confirmed receipt of your audio. *If you delete it from your computer and we are unable to download the file, you may have to redo your coaching.*

SUBMITTING A TRANSCRIPT OF THE AUDIO RECORDING

Requirements for the transcript of your recorded coaching session:

1. Listen to the audio recording of your coaching session and transcribe the words exactly how they are spoken, except names and other identifying words.
2. The transcript should be typed and include each of the following components:
 - a. All words spoken throughout the audio recorded session
 - b. Clearly label the statements made by the coach and those made by the client
 - c. Notes about your use of the coaching spirit throughout the session (this allows you to assess and reflect on your coaching strengths and areas for improvement).

Examples of transcripts start on page 7

EXAMPLE: CODING A TRANSCRIPT – MEETS EXPECTATIONS

This excerpt from a transcript shows a coach demonstrating competency in several tools and skills. Additionally, she is self-reflective and notes areas that she could have improved.

Coach: It feels pretty good to be in that place.	I added a reflective listening statement here.
Client: Yeah, mm-hmm [affirmative]. Yeah, it does. It feels really good.	The client's response was not as expansive as I expected here. She does agree with my encouragement.
Coach: That momentum for all your classes, it sounds like you are taking that and turning it into some healthier eating and some self-care.	Because my previous reflective listening did not receive a lengthy answer, I tried a more in-depth attempt at reflective listening statements. This one is focused on what she mentioned earlier in the conversation.
Client: Yes, I was. I'm going to try to find a happy balance between the two so that I can still do exercise and work on starting the health coach business. Next week I'm going to try to do the evaluation for health coach. I haven't even been lifting weights and normally that's the exercise that I do, but I've been doing yoga and Zumba type classes and stuff.	The client expanded on what she's been doing to progress some of the areas she's had on her goals, reiterating her areas of focus.
Coach: In the past two weeks you've been doing all those kind of classes?	The client introduced some new activities, which took me by surprise. I need to slow down my questioning so I can deal with being surprised.
Client: Yeah.	Because of my surprise, I asked a close-ended question and her response was brief. I need to ensure it is an open-ended question.
Coach: Oh, awesome.	My brief response matched hers, while trying to show support for her actions. However, I need to make sure these responses do not become a roadblock to conversation with the client.
Client: Yeah, to try something new. I was kind of doing it intuitively. Whatever I kind of felt like doing, that's what I was doing. It seemed to work out fine.	The momentum of the previous open-ended questions seems to have stalled. Here she appears to be responding to my earlier surprise.
Coach: You seem to enjoy and find a lot of pleasure from all the different classes you take, and all the different exercises. I think that sounds great. You are so well into your three times a week that we had talked about earlier, it sounds like.	I am attempting to get the conversation back to the client's priorities, even though this reflective statement seems to fall flat.
Client: Yeah, mm-hmm [affirmative].	The client seems to be expecting me to ask a question.

Coach: That's great.	Again, I am trying to encourage the client for her actions.
Client: I like learning. I mean I just like learning new things whether it's class, health coach, exercises, seeing what I'm capable of doing.	The client seems to be continuing what was said earlier about trying something new. She's continuing a thread, which I should have followed up.
Coach: You've been doing a lot of exercise, a lot of self-care. It sounds like you've taken a break from doing some of the focus on the business, but you had reached a point where you finished all those classes for Precision Nutrition, and also for the UNCG coaching as I understand it. What might you want to work on today?	Instead of following up on the client's comment about learning things, I shift to the previous goals she's stated and then ask the client what might be the focus for her during this session. While this shows I have listened to her success, I need to ensure that I'm not missing the client's indirect suggestions for the agenda.
Client: Well, I've wanted to make one of my goals to try to drink a gallon of water a day, because whenever I do that, I feel so much better. I don't always succeed, but every day I take a gallon jug and fill it with water, and try to drink it all. I just feel better when I do that, especially since I'm exercising more, trying different things and eating better. I kind of want to get back to doing that as well.	Because I've not followed up on the client's discussion of her love of learning, the client mentions a specific goal and explains her motivation, the goal's importance, and her reasons behind the goal.
Coach: You haven't been doing it, or you have been doing it?	I needed clarification to confirm she has experience attaining the goal she wants to establish.
Client: I have not been doing it. Well, last week I started. Wednesday I think, I started building back up to getting to a gallon a day.	The client clarifies that it is a goal she's already set in motion.
Coach: What motivated you to do that?	Although this is an open-ended question, it may have come across as a nosy, probing question. Instead, perhaps I could have responded with "Tell me more about that."
Client: I think just because I was eating healthier and I was feeling better, I was just trying to think, "Okay, well what ways will make me feel even better?" I've remember, "Oh yeah, you can drink that water again. You could try that." Then I went for a facial and just trying to ... Just self-care stuff, because I haven't been doing much of that. Well, I shouldn't say I haven't much, not as much as I should be and I realize that.	Even though it was a nosy question, it did elicit the response that the client doesn't think she's done much self-care.
Coach: What I'm hearing you say is that you're not doing as much self-care and you're wanting to do more.	In this instance I'm attempting reflective listening statements. It comes across maybe closer to an affirmation.

EXAMPLE: CODING A TRANSCRIPT – DOES NOT MEET EXPECTATIONS

Incomplete review or critical reflection of the coaching skills. The coach makes some criticisms of the coaching skills, strengths, and weaknesses. The coach labels statements that masquerade as a reflection, but are loaded with coach's intent to direct the conversation toward what coach thinks is the best solution for the client.

	Transcript	Connection to Coaching Skills & Spirit
COACH:	Hey Lori it's good to see you again.	<i>Paradigm shift</i>
CLIENT:	Good to see you.	<i>Mind-set that they are equals</i>
COACH:	When we spoke at the doctor's office we talked about your smoking and so I just wanted to follow up today and - and see how that's going. You were going to go do yoga I believe.	<i>Client centered partnership – Gives client opportunity for reflection on previous goals</i> <i>Ethical practice – includes visit with doctor to address whatever issue was beyond her skill level</i>
CLIENT:	Yes.	
COACH:	Yeah. Did you go to yoga?	<i>Authentic Presence</i>
CLIENT:	I did go. I've been once.	
COACH:	You've been once in a week?	<i>I am reiterating to the client what she said so the client knows that she is listening and understands</i>
CLIENT:	Um I've been once in the last month.	
COACH:	In the last month okay. Um how about cutting back on your cigarettes? Have you been able to do that?	<i>Client centered partnership/empathy – again, time for reflection of previous goals, I repeat the client's info so that she is aware that I am focused on the discussion</i>
CLIENT:	Um a little bit.	
COACH:	Yeah? What is a li-- what is a little bit mean?	<i>Authentic presence – asking important questions</i>
CLIENT:	Uh I'm cutting back you know to maybe just about six a day where I was doing about ten.	
COACH:	Okay. So you've kind of not - not quite half.	<i>Authentic presence/empathy – building trust by repeating info</i>
CLIENT:	Not quite half.	
COACH:	Um but you've managed to cut back some, yeah. And you were thinking about other things to do to - to decrease the stress. Have you been able to do anything like that?	<i>Mindset paradigm shift/client centered partnership – I am asking pertinent questions about what the client actions the client has self-motivated into doing creating a back and forth dialogue while showing support.</i>
CLIENT:	To meditate.	
COACH:	Um that was one thing yeah. Have you been able to meditate?	<i>Authentic presence – repeating, asking questions</i>
CLIENT:	I have some - couple of times.	

	Transcript	Connection to Coaching Skills & Spirit
COACH:	Yeah.	
CLIENT:	Yeah. It just - just been a lot going on so I hadn't had a lot of time for it so.	
COACH:	All right. So, I know we talked about yoga and we talked about meditation. Um was there any - oh tai chi, you were going to look into that.	<i>Authentic presence – keeps repeating client</i>
CLIENT:	Yeah I haven't done that yet.	
COACH:	You haven't been	<i>I believe this response is to encourage client to speak more.</i>
CLIENT:	Not yet.	
COACH:	Okay.	
CLIENT:	Still on the radar but I haven't done it yet.	
COACH:	So if you had to rate your stress level right now where would that be?	<i>Authentic presence/empathy – asking important questions</i>
CLIENT:	Well probably eight. On a scale of one to ten probably eight?	
COACH:	Oh on a scale of one to ten so it's still really high.	<i>Authentic presence/empathy</i>
CLIENT:	Very high.	
COACH:	Yeah. So - so it really sounds like you um you probably need to be doing some more stress relieving things if you - if - if you still want to cut back smoking cigarettes which I - I think you do and I know your doctor uh really wants you to cut back smoking.	<i>Compassion – allows client to see that I am worried about the client's well-being and wants to motivate her to do more relaxation exercises.</i> <i>Ethical practice – uses knowledge from doctor to assess smoking cessation.</i>
CLIENT:	Yes.	
COACH:	Yeah so um you know if - if I may suggest um you know really trying to increase that yoga would be a good thing. Um is that something you think you could do?	<i>Client centered partnership – asks permission before making suggestion.</i> <i>Compassion – asks client if she thinks that it is actually something she could do.</i>
CLIENT:	Yeah I'm gonna try.	
COACH:	You're gonna you're gonna?	<i>Authentic presence</i>
CLIENT:	I'm gonna try.	
COACH:	How many times do you think - you did it one time this past month? So how many times do you think you could do it?	<i>Client centered partnership – provides opportunity for support and more self-reflection from the client</i>
CLIENT:	Maybe - maybe go once a week.	
COACH:	Maybe once a week? Okay.	<i>Authentic presence</i>
CLIENT:	Yeah.	

	Transcript	Connection to Coaching Skills & Spirit
COACH:	Okay.	
CLIENT:	Add a little bit more every week.	
COACH:	And then how about the meditation?	<i>Compassion – trying to motivate the client into doing more.</i>
CLIENT:	Um I really would like to do that daily if I could and somehow even if I can't do it in the morning maybe I can fit it in at night.	
COACH:	Okay. What's - what's been getting in your way for doing that?	<i>Client centered partnership – letting the client focus on and realize obstacles or excuses.</i>
CLIENT:	Um my husband's had a lot of job issues lately and of course.	
COACH:	Yeah so you're putting him ahead of you again?	<i>Empathy – restating client's words in her own words</i>
CLIENT:	Yeah he's been under a lot of stress so just trying to keep him on an even keel.	
COACH:	Yeah okay. It's kind of hard to take care of yourself when you're	<i>Empathy/compassion – letting client see that she knows, understands, and cares</i>
CLIENT:	Yes.	
COACH:	... looking after someone else yeah. But you do realize that this is very important for you, for your health cause you want to be around there for him.	<i>Compassion – reminding the client that she is important and trying to re-motivate her.</i>
CLIENT:	Yes, yeah.	
COACH:	Yeah.	
CLIENT:	I do.	
COACH:	Okay	
CLIENT:	I do.	
COACH:	So why don't we stop right there.	

EXAMPLE: REFLECTION FOR UNCG HEALTH COACH TRAINING CERTIFICATE

SAMPLE REFLECTION

At our first meeting, we discussed the coaching agreement and coaching relationship before moving to her responses to the welcome packet. This helped explore what she hoped to get from coaching and her personal information about motivations in life and where she wanted to go in terms of her wellness. The client and I discussed the role I would play as the coach, and what was expected of both of us in the relationship. I asked her what she expected of me, and then offered up what I expected of her as the client. I explained some tenets of coaching which helped her understand my role (e.g. being an ally and a source of accountability).

We established the coaching agreement, making sure we both understood I was there as a partner and sometimes a guide. The client wanted me to tell her what to do, but I assured her that in terms of her behavior, she was the expert, and I was just someone with knowledge about how to help her use her expertise to make changes. The client noticed I was being non-judgmental as she spoke. She said that she expected me to ask "why she did X or thought X," and noticed I did not. She wanted to know why. I told her how I was there to help each of us understand her, the changes she wanted to make, and her motivations and fears better so that she could be successful. The why was not that important, rather we focus on the what and how.

We communicated effectively face-to-face, via email, and by telephone. I found the most important part of effective communication was listening for clues and cues. The client would ramble quite a bit in telling me what she had done since our last meeting or what she wanted to do next, but there were always clues about barriers she was facing, motivations for other things that got in the way or helped in making changes. By asking specific questions about these things and other concepts of the Social Cognitive Theory, she would have to be accountable for her actions and this helped her make progress. She said the sessions where she had to "fess up" to herself were very powerful to her.

There were a few coaching challenges; for example, there were many times the client would state erroneous facts. Sometimes I asked her how she came to know these facts. She normally replied something like the following, "That is what I was always told." In such cases, I asked her if she would like to try to verify what her believed. Normally she would set this verification as one of the tasks for the ensuing week. She began to seek information about her beliefs on her own.

One good example revolved around her idea of what constituted healthy eating. Early and often in our sessions she would say "I am trying to eat healthy, I have been having a salad every day this week." I asked her how she knew a salad was healthy, and what made it so. She struggled with that (what she had been told), and made a commitment to look up what a healthy salad was. Of course, she was surprised to find that the salads she was eating out at lunchtime with co-workers were not very healthy

for her. This spurred a whole new motivation to look into other aspects of her ideas of what made “healthy foods.”

The client is definitely testing her own ‘factual knowledge’ about physical activity, fitness, and healthy eating. In fact, she almost always has some new discovery to tell me when I see her in non-coaching settings. I believe the client and I learned the following through our time together:

- *Consider new awareness or perceptions.*
- *Consider a choice to make changes.*
- *Consider a plan in action even if actual change is still in progress.*

She has definitely made and executed a plan to increase her physical activity and that continues to go well and will improve when her kids get back in school/daycare. Her plans to ‘eat better’ are still evolving. Her understanding of what that means has changed drastically and gotten more realistic in terms of her ability and confidence. The great challenge she is working on now is a plan to keep making progress during football season when she and her family have a history of tailgating every weekend (unhealthy foods and lots of food and drink). We discussed plans to achieve those goals moving forward, as we concluded our own coaching relationship.

I have learned quite a bit from working with this client. First, I have learned again how much of a struggle it is for us to do something we want to do. In addition, I have learned how ingrained our behaviors are and how much influence the systems we live in and have created make change difficult. Third, I have been reminded that we have to be forgiving of our clients, and ourselves so we do not see ourselves as failures when some goals are not achieved. I learned that clients have obligations that go well beyond the behavior change they are trying to make, and these obligations and people involved can be supportive of the client’s change or they can retard it, even unintentionally. For example, my client was making great progress in her physical activity change, and her spouse developed an illness that was serious and incapacitated him for some time. They have 3 children ages 9, 5, and 1, and so my client was ‘trapped’ into caring for all family members around the clock. Finally, I have learned that accountability is a powerful aspect of the coaching alliance. For this client, it has made a huge difference. Even though the client did not meet all goals, she began taking initiative for her own learning and skill development.

TOOL: COACHING NOTES**Name:****Session #**

Date:**Session Start – End Time**

Client commitment/agreement from previous session *(taken from last week's progress notes)*

Progress Notes

Challenges**Opportunities**

Next Session: Client commitment/agreement

Challenges or improvements as a coach

EXAMPLE: COACHING NOTES

Name: Dawn	Date: February 11 (session 3) 2:00-
Previous Week Agreement	
<p>1. Buy or order a new, less squeaky lawn chair for her cubicle, ideally with a footrest. In a perfect world she'd like a recliner for her cubicle, but that may not be feasible.</p> <p>2. Go out to lunch at a new restaurant for a good salad. She'll need to determine how long it will take round trip, so that she's not away from her desk longer than she's supposed to be.</p>	
Progress Notes	
<p>Dawn got some much needed time off recently which meant that we had to be flexible about scheduling our next meeting time. She visited her mom for 3 of her 4 vacation days. Her sister has been caring for her mom during the week, so she was able to give her a break for a few days. She then took her mom to visit her kids, which was equally stressful and enjoyable. Dawn has been experiencing a sense of loss and grief for having both of her parents being terminally ill, and she found out that her daughter is separating from her son-in-law, who Dawn really loves and connects with. Again she reiterated that her private and family life aren't going very well, so she still feels like work may be the only place for change.</p> <p>We briefly talked about her symptoms of depression and she brought up that she's been considering seeking counseling, particularly grief counseling. She was a bit stumped about how to get started since she's new to town and doesn't have any references yet. Before she moved she had a great counselor who she misses, but doesn't think that they can do distance counseling. She's got a fair amount of anxiety about catching a new counselor up, but will plan to look into getting recommendations for local counselors anyway.</p> <p>Her mind has been whirring around opportunities to be more physically active. She hates the gym but she likes dancing and walking in new places. Last weekend she and her husband went hiking at Pilot Mountain and although it was challenging she really enjoyed it. She'd like to find a Zumba class, and will look into that over the next couple of weeks.</p> <p>She's still looking for a lawn chair for her office space, since she'd really like to replace her currently clunky one with one that has a footrest and folds so it fits better in her cubicle. She's also found some handmade marbleized paper that she plans to attach to her metal cabinets to make the workspace prettier. She might also get a scented candle for aromatherapy and art for her walls. She will also look into better noise-reducing headphones for music since she's still distracted by general work noises with her</p>	

Challenges	Opportunities
<p>Regarding finding a new counselor, Dawn is feeling some stress about not only finding someone she likes, but also catching them up to all of the issues she'd discussed with her previous counselor.</p> <p>Right now we're getting a little bogged down with specific office improvements. She's made a lot of progress already and seems to be on a roll and very energized, so redirecting her to just tracking this on a progress log may be better, so we can focus on making space for some of the other goals she brought up this session.</p>	<p>Dawn came up with the idea of founding a counselor without direct intervention! Because she previously had a counselor we can leverage her self-efficacy from that experience to make finding a new one easier.</p> <p>Some ways that Dawn has found over time help her to overcome low motivation and other barriers are having someone to be accountable to (which makes having a health coach particularly helpful!) on her outcomes, and being able to check items off a list, which gives her a great sense of accomplishment. We can easily apply this to her office improvements.</p>
<p style="text-align: center;">Next Week</p> <p>Call Mental Health Association for names of 3 good counselors.</p> <ul style="list-style-type: none"> • Client's confidence level: Dawn was on the borderline for this goal, as she was between a 6 and a 7. I want all of her confidence levels to at least be a 7, so I asked her to reassess the goal. At first, she was going to contact 5 good counselors, but moving the number down to 3 made her feel more comfortable. Now, Dawn says she is at a 7 for this goal. Dawn felt like it will be difficult to catch a new counselor up to speed, but this is something she really benefited from before. <p>Look for a Zumba class and make a plan for how to get to it.</p> <ul style="list-style-type: none"> • Client's confidence level: The client's stated her confidence level for this was around an 8. Dawn has never tried Zumba before, but she is excited to try out a new kind of dance. <p>Start tracking office improvement efforts on a tracker on her fridge.</p> <ul style="list-style-type: none"> • Client's confidence level: 9. She feels good about making improvements to her office and she likes having checklists, so the Dawn thought this goal would be easier 	
<p>Challenges or improvements as a coach:</p> <p>The issues the client brought up this week surrounding grief and wanting to see a counselor were something I was not used to. I am much more comfortable talking about exercise or stress management. I was glad it was not in my scope of practice to do any sort of counseling, but just help serve as a resource guide. Even though I wasn't counseling, I thought I did a good job of being empathetic and having authentic presence.</p> <p>A new challenge I encountered this session was allowing silence. I guess I have been having trouble with it all along, but I truly noticed it this time. Dawn was taking a minute to think, and I felt like I needed to say something to fill the void. At one point, Dawn even asked, "give me a second", and that is when it really hit me that I need to be better about allowing silence.</p>	

FORM: VERIFICATION OF COACHING EXPERIENCE

To be eligible for the certificate as a health coach, you must complete a minimum of 4, and not more than 6 coaching sessions with a client following the completion of the three-day health coach training. The first session should be at least 1 hour, and subsequent sessions should be at least 30 minutes, for a total of 3.5 required coaching hours.

Verification of these experience hours indicate that you have practiced the coaching spirit and foundational coaching skills, as well as facilitated a coaching relationship with a client. Continuing to practice these coaching skills in the context of an ongoing relationship with a client will further develop your expertise as a coach. Please complete this form to verify that you have had at least 4, not more than 6 coaching sessions with one client.

I _____ attest that I have completed at least 4 and not more than 6 coaching sessions with one client following the completion of the 3-Day Health Coach Training program delivered by UNCG Health Coaching Programs. Below is a log of the dates and times for those coaching sessions.

Below is a log of the dates and times for those coaching sessions. I have highlighted or marked the session that I have transcribed which is a minimum of 30 minutes.

Session	Date of Session (MM/DD/YY)	Start Time	End Time	Total Duration of Session (in minutes)
1				
2				
3				
4				
5				
6				

Signature

Date

UNCG HEALTH COACH CERTIFICATE RUBRIC

The rubric provided on the next two pages will be used to evaluate your submission materials. Please be sure that each competency listed in the rubric is represented in your submission in some way*. If we cannot evaluate one of these components, you will receive 0 points for that section.

Our rubric is based on NBHWC's Practical Skills Assessment. For their complete rubric, visit their website.

	GENERAL REQUIREMENTS	Met
Training Hours:	Completed 3-Day Training	
Knowledge Assessment:	Exam passed with a score of 70% or higher	
Experience Hours:	Verification of 4-6 coaching sessions – <i>first session is at least one-hour, the rest are at least 30 minutes</i>	
Experience Assessment:	Audio Clip of full coaching session	
Experience Assessment:	Transcript of recorded session	
Experience Assessment:	Transcript includes personal assessment and reflection	
Personal Reflection:	Clearly written	

*We realize that, depending on the session, you might not fully capture each of these components in your audio clip. If they aren't discussed in your transcript, please write about them in your reflection or coaching notes.

Measure of Competency in Health Coaching Components

Audio, Transcript and Reflection: Demonstrate the framework of the coaching process

Application of the Framework:	Score:	Commentary from Reviewers:
Creating an Alliance & Opening the Session: Develops a coaching agreement, demonstrating coaching spirit, showing compassion, being empathetic)		
Assessment/ Exploration: Utilized effective skills and tools to assess the client such as readiness for health coaching, DARN (desire, ability, reasons, need), OARS (open questions, affirmations, reflective listening, summations), Offering advice (asking permission, offer advice, emphasize choice, elicit response), eliciting change talk, encouraging exploration)		
Setting Agreements: Partners with client to develop effective, measurable health goals. Accountability & Tracking: Managing progress, accountability, and tracking with client (action plan, bubble tool, weekly tracker, readiness for change) Measuring Outcomes: Utilizes skills and tools to measure the outcome of client goals. Reassessment: Identifies strategies for reassessment of client and goals.		
Concluding/ Closing: Celebrating and closing the coaching relationship.		
Communicating with the Coaching Spirit: Demonstrated active listening, showed empathy, used language that reflected the mindset shift, communicated with non-judgment, advocated for client autonomy		
Test Score		
Recommendations for Professional Development		
Requirements for Certification		

Rating Scale:

Highly Competent: Performance exceeds requirements and expectations.

Competent: Adept with independent demonstration of skill consistently meets expectations.

Developing Competence: Learning basic or introductory skills- meets some, but not all expectations. More practice is needed.

Unsatisfactory: Performance consistently fails to meet minimum requirement. More supervised practice is needed.

Each component of the framework is broken down into the following sub-categories that make up your overall score:

Creating the Alliance	<i>Calm, present, and emotionally available</i>
	<i>Establishes rapport</i>
	<i>Coach and client are clear about coaching process</i>
	<i>Coach is confident in self, process, and the client as a full partner in the relationship.</i>
	<i>Coaching agreement is established and the coach advocates for the client to take control of the process.</i>
Opening the Session and Setting the Agenda	<i>Welcomes rapport building time to settle into the session.</i>
	<i>Invite client to determine priority areas of focus.</i>
	<i>Explore the client's vision of optimal health and wellbeing.</i>
	<i>Maintains the client as the center of attention.</i>
	<i>Review client's specific long-term goal that leads to desired well-life vision.</i>
Exploration & Assessment	<i>Help client explore and articulate values, sense of meaning and purpose of practice.</i>
	<i>Encourages the client to assess current state of her/his health and/or wellbeing.</i>
	<i>Facilitate process of self-discovery, learning and insight.</i>
	<i>Explore broader perspectives and inspire interest in new possibilities.</i>
	<i>Prompt for, and amplify positive resources (including past successes, qualities, strengths, and skills)</i>
	<i>Comfortable with full exploration for awareness without leading to an agenda.</i>
	<i>Explore patterns related to client behaviors and decision tendencies.</i>
Setting Agreements	<i>Invite the client to examine his/her perception in a new way.</i>
	<i>Anticipate, plan for, and help client navigate challenges.</i>
	<i>Establish goal(s) to be enacted by 3-6 months or by end of coaching agreement)</i>
	<i>Establish or refine client's short-term SMART goals or action steps for what will be accomplished between sessions</i>
	<i>Establishes client's preferences for maintaining self-monitoring and accountability.</i>
	<i>Invite the client to provide feedback to the coach on the agreements and the change process.</i>
Managing Progress & Measuring Outcomes	<i>Acknowledges agreements that include processing such as thinking, creating and doing steps.</i>
	<i>Honor client's preferences for self-monitoring and accountability.</i>
	<i>After first session, checks in on client's prior session commitments and action steps</i>
	<i>The coach helps the client to create new awareness by engaging in problem solving.</i>
	<i>Views the agreement and outcome from the client's point of view, understanding that change is difficult and ongoing.</i>
Closing the Session	<i>Articulates new action steps and adjust plan if needed, with self-monitoring.</i>
	<i>Discover and reflect client's learning, including "take-aways" from session.</i>
	<i>Affirm client's effort during the session.</i>
	<i>Restates or has the client restate the agreement to what they plan to work on in the upcoming week(s).</i>
Concluding the Relationship	<i>Operates within scope of practice and refers client to outside source, as needed.</i>
	<i>Affirms client's efforts and growth.</i>
	<i>Invites client to reflect on, assess, and articulate progress made, changes experienced, lessons learned, and growth achieved</i>
	<i>Assists in developing sustainable pathways forward and maintenance plan including available supports and resources.</i>
	<i>Wraps up coaching relationship with care and warmth.</i>
Communicating with the Coach Spirit	<i>Invite the client to provide the coach with feedback about the coach process and the coach.</i>
	<i>Demonstrates active listening.</i>
	<i>Shows empathy by showing a deep understanding of the client's view based on comments that add meaning.</i>
	<i>Uses language that reflects the mindset shift.</i>
	<i>Ensures client's agenda, needs, interests and preferences drive the coaching relationship.</i>
	<i>Creates sufficient space for the client to have equal or more communication time than the coach.</i>
	<i>Asks open-ended questions that expand communication and conversation.</i>
	<i>Asks questions that help the client create the future rather than focus on past or present dilemmas.</i>
	<i>Shares information within scope of coaching practice.</i>
	<i>Affirms client's personal attribute(s) and/or behavior(s).</i>
	<i>Communicates with non-judgment.</i>
	<i>Advocates for the client to take control of the process- making the client's choices more prominent.</i>
	<i>Makes use of silence as a tool to enhance the coaching process.</i>

UNCG CERTIFICATE PLAN

You have 6 months from the last day of this training to submit your materials for certification. If you completed your training prior to October 30, 2020, you have one year to complete the training.

Remember to build in time for the potential of needing to find a second client to work with, if your buddy coach session does not work the way you would like it to.

Activity

Date Planned & Resources Needed:

☐ AHEC Online Evaluation:

☐ UNCG Online Exam:

☐ Identify Buddy Coach:

☐ Begin Coaching Sessions:

☐ Complete Coaching Sessions:

☐ Complete Transcript & Reflection:

☐ Submit Materials to UNCG:

For more information about this process, contact our Health Coaching Team at coaching@uncg.edu.

The review of your health coach certificate materials will include the grading of your exam and review of your coaching certificate materials. UNCG Health Coaching Programs Faculty will provide you with written feedback on your coaching certificate materials. You will be provided with personalized feedback as well as expectations for your continued growth as a health coach.

Please allow 6-8 weeks for the review of your materials. It is common for UNCG Health Coaching Programs to receive an influx of materials for review around the submission deadlines, which may delay the review process. Remember, we run on an academic schedule meaning that winter, spring, and summer breaks will also delay review time. Upon receipt of all required certificate materials, you will be placed in queue for review.

Please note: Continuing education is not required to maintain this certificate at this time. As the requirements for the National Board Certified Health & Wellness Coach Credential are updated, the CEU requirements for the UNC Greensboro Certificate may change. However, it is strongly encouraged that training participants seek out continuing education for coaching. Continued education and training will ensure that you stay up-to-date on the evidence-based best practices for coaching.