

## **PROGRESS REPORT – July 2011**

### **VISION**

The Vision of the National Consortium is to develop legitimacy, through standards and evidence, in order to enable wide respect and implementation of the role of professional health and wellness coaches in healthcare and consumer wellness, as well as the wide integration of coaching competencies in the work of health professionals.

Professional health and wellness coaches improve health and well-being through their expertise in helping clients build personal responsibility and self-motivation, develop optimal capacity, and engage consistently in positive health mindsets and behaviors. Coaches are becoming important change agents in transforming health care from a system that fosters dependency to one that empowers individuals to take charge of their health and well-being (quoted from participant teams at 2010 Summit described below).

### **THE NEED**

Given that the treatment of lifestyle-related diseases makes up 70% of health care costs, the next economic crisis that looms is the ballooning of health care costs associated with an epidemic of preventable lifestyle-driven diseases. Even though the evidence for healthy lifestyles as a means to improve mental and physical health and prevent and ameliorate lifestyle-related diseases is well established, engagement is woefully inadequate.

One key strategy to address this crisis is to launch a new professional in health care and wellness: a professional coach who is a well-trained expert in facilitating sustainable lifestyle change, supporting wellness and disease prevention, and serving as a motivating role model. Today several thousand health and wellness coaches work in diverse settings - corporate wellness, health club, medical fitness facility, hospital, clinic, health plan, spa, and private practice in the US and many other countries. This strategy also includes the integration of coaching competencies into many health professions, including nurses, physicians, , dietitians, exercise and mental health professionals, physical and occupational therapists.

Over the past three decades, the groundwork for this new focus in health care was developed and cultivated through the efforts of many health and wellness advocacy organizations and individuals who have worked tirelessly to change the direction of patient care from disease-focused to one of patient empowerment, disease prevention, and wellness.

These early advocates paved the way and created support for this new profession through their influence on the 2005 guidelines for the practice of health care in all settings, as mandated by both the Joint Commission on Accreditation of Health Care Organizations (JCAHO) and the

Institute of Medicine (IOM). Key guidelines include:

- placing patients at the center of their health care
- treating the patient as a whole person
- shared decision-making

## **BACKGROUND**

The beginnings of this national volunteer endeavor came together through the work of several teams and initiatives in 2009, stimulated by health care reform meetings. In January 2010 a founding team formed, now the Leadership Team of the larger National Consortium; this team is comprised of volunteer members who are leaders in health and wellness coach training, credentialing, and practice in academia and industry. They also represent a number of health professions. Appendix 1 summarizes current Leadership Team members, including an Executive Team of five volunteers elected by the Leadership Team in May 2011. Appendix 2 summarizes the coaching and health professional organizations currently represented on the National Consortium.

The National Consortium is committed to developing practice standards and training and education standards for professional coaches in health care and wellness, supporting the integration of coaching competencies into health professions, and supporting a collaborative coaching research endeavor. Work has focused on important topics that support the emergence of a national standard for the practice coaching professionals. These topics include job definition and tasks, scope of practice (including appropriate recommendations of other health professionals), and prior degrees, credentials and coach training and education necessary to deliver a minimal standard level of competency demonstrated through a national certification process.

Having identified areas of controversy and confusion, we appreciated from the outset that participation and buy-in by a diverse and national audience would be critical for successful implementation of health and wellness coach practice standards and certification. We sought and received generous financial support from The Institute for Integrative Health to host a *Summit* on September 26/27, 2010, to address critical issues, build consensus on a vision, and develop a strategic working plan for the launch of national standards and credentialing of health and wellness coaches.

We invited representation from important associations and organizations, as well as individual leaders from conventional health care, coaching, education, and integrative health, to the September 2010 Summit. 80+ invitations were extended and 70 participants attended, representing over 45 national organizations.

The Summit started with an overview of the current state of the field, and an articulation of the issues at hand identified by the Leadership Team. An *Appreciative Inquiry* process began with visioning exercises, giving shape to what participants saw as an ideal future for health care, and bringing clarity as to the optimal role of the professional coach in health care by 2015. Themes identified in the collective vision included health & wellness coaches:

1. Being a vehicle to create a paradigm shift to the “whole person”
2. Being a catalyst for change of the delivery of health care from dependency to empowerment
3. Empowering, inspiring, and transforming both clients and providers
4. Spanning the continuum of health: from the very sick to those pursuing increased health (primary prevention)
5. Becoming a routine and integrated part of the health care system and consumer wellness

The next phase took us into small groups to identify strategic focus areas and action plans for next steps:

1. **Competencies** - Determine professional core coaching competencies, recognizing at least two educational and practice paths: (1) professional coach (full-time coaching); and (2) Integration of basic coaching skills into current health professional roles.
2. **Role definition** - Define and clarify roles, and consensus around scope of practice within existing professions and outside of them in the context of an independent field of coaching in health care and wellness. Facilitate paradigm shift, from individual/expert/silo approach to a collaborative holistic approach.
3. **Certification board** - Establish a National Health and Wellness Coach Certification Board to follow certification best practices and refine job definitions and tasks, identify prerequisites and training/education standards, design tests, and delineate scope of practice.
4. **Government relations** - Pursue a government relations agenda to create vision/goals related to government (e.g., recognition as a profession, reimbursement strategies/concepts) and identify opportunities and barriers; recognizing the critical and urgent timing given the current state of Health Care Reform legislation, which already includes language about and positioning of health and wellness coaching.
5. **Media** - Develop a media/PR strategy, to guide partnership, collaboration, and outreach with all stakeholders, general public, etc.; to brand coaching, create public awareness and lay a foundation for collaborative partnerships

6. **Research** – Continue and expand an active inter-institutional research team, working to launch critical and fundamental studies evaluating both health and cost impacts of coaching; cardiovascular-related illness and musculoskeletal pain were two areas identified as being the most impactful. This can then lay critical groundwork and build a network of professional relationships necessary for funded multicenter trials in the future.

## **CURRENT STATUS**

From the Summit in September 2010 to June 2011, a group of project teams were formed by the Leadership Team, emerging from volunteer “tables” at the Summit, and they started work on next steps.

**The Certification project team** identified a best practices process for certification development and facilitated the inclusive development of a “job definition” for the professional health and wellness coach, supported by a certification expert generously funded by ACSM:

*Certified Health and Wellness Coaches are professionals from diverse backgrounds and education who work with individuals and groups in a client-centered process to facilitate and empower the client to achieve self-determined goals related to health and wellness. Successful coaching takes place when coaches apply clearly defined knowledge and skills so that clients mobilize internal strengths and external resources for sustainable change.*

The International Coach Federation is generously sharing its expertise and work-in-progress in developing coach certifications and training and education standards.

**The Training & Education project team** developed a flow chart model to summarize job domains, educational requirements, tasks/skills, training format and scope, and testing approaches, building on the draft job task list developed before the Summit, and started to explore program accreditation organizations and options.

**The Government Relations project team** developed a first draft white paper to share with government health officials and regulators to seek support and position health and wellness coaching in healthcare reform.

**The Coaching Research project team** is supporting the advancement of health and wellness coaching research through the sharing of expertise, tools, and common framework across multiple centers.

**The PR project team** has identified next steps once we are ready for significant media outreach.

**The Leadership Team** elected an Executive Team of five individuals in May 2011 to strengthen the leadership and navigation of this large and complex volunteer endeavor. The current focus is the expansion and integration of stakeholder organization representation, creation and launch of a project plan and a nonprofit legal entity, and fundraising to enable the completion of:

1. Develop a job task analysis that would lay the ground for a certification knowledge test, assist with building of training and education standards, and would involve an intensive focus group of practicing coaches and a wide validation survey. The job analysis would also assist to identify coaching competencies suitable for integration into various health professions.
2. Develop training and education standards, including prerequisites, coach training and education curriculum, mentoring and supervision, and oral skills assessment, to involve an intensive focus group process of subject matter experts (such as a DACUM process) and a wide validation survey.
3. Identify structural options for certification of health and wellness coaches as well as accreditation of health and wellness coach training and education programs. We are consulting industry experts and CAAHEP and ABHES, two organizations focused on credentialing programs in health science occupations.
4. Support a broad coaching research strategy to deliver the evidence for health and wellness coaching to prevent and treat various lifestyle-related diseases.

The project plan then includes a second Summit to review the results of a job task analysis and training and education standards development, and determine the best path forward for national standards and certification, in collaboration with all stakeholders, including key health professional organizations.

### **Summary**

The National Consortium (Appendix 4 has full listing of 73 participating organizations) is making steady progress toward our vision of developing standards and certification of professional health and wellness coaches over the coming months and years. We welcome many important contributions to:

- Identify suitable funding sources for the project plan summarized above
- Recruit stakeholder representatives of health professional organizations
- Provide expertise in establishing standards and testing of skills and knowledge of a new professional and expertise in accreditation of health professional training and education programs
- Provide general input and support by joining the National Consortium mailing list

If you would like to contact us, email any member of our Executive Team:

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## Appendix 1

### Leadership Team

*\*Executive Team of five volunteers elected by Leadership Team for one year term from July 1st 2011*

Michael Arloski, PhD, RealBalance Global Wellness Services

Linda Bark, PhD, RN, MCC, Bark Coaching Institute, JFK University, AHNA

*\*Michael Burke, EdD, Mayo Clinic*

*\*Richard Cotton, MS, American College of Sports Medicine*

Georgianna Donadio, PhD, National Institute of Whole Health

Roy Elam, MD, Vanderbilt Center for Integrative Health

Jody Hereford, BSN, MS, The Iowa Chronic Care Consortium

Meg Jordan, PhD, RN, California Institute of Integral Studies

*\*Karen Lawson, MD, University of Minnesota Center for Spirituality and Healing*

John Livingstone, MD, Assistant Clinical Professor, Harvard Medical School at McLean Hospital

*\*Margaret Moore, MBA, Wellcoaches Corporation; Institute of Coaching, McLean Hospital, an affiliate of Harvard Medical School*

Pamela Peeke, MD, MPH, advisor to Surgeon General, Chief Medical Correspondent, Discovery Health TV

Linda Smith, PA-C MA, Duke Integrative Medicine

*\*Ruth Wolever, PhD, Duke Integrative Medicine*

**Appendix 2 - Stakeholder Organizations**

Academic Consortium for Complementary and Alternative Health Care
American Association of Cardiovascular and Pulmonary Rehabilitation
American Association of Diabetes Educators
American Board of Holistic Integrative Medicine
American Chiropractic Association
American College of Lifestyle Medicine
American College of Sports Medicine
American Holistic Nurses Association
American Holistic Nurses Certification Corporation
American Occupational Therapy Association
Case Management Society of America
Health club industry/YMCA
National Commission for Health Education Credentialing / American Association for Health Education (CHES - Certified Health Education Specialist)

International Coach Federation
Patient Advocates
Preventive Cardiology Nurses Association
National Wellness Institute (corporate wellness)
Society of Behavioral Medicine



### **Appendix 3 - Summit Highlights**

#### **Participant Feedback**

“The summit greatly exceeded my expectations. I became aware that this is far more than an academic inquiry about coaching. This effort has the opportunity to fundamentally change the culture of health care. I arrived interested; I left committed.”

“The Summit was very powerful in terms of connecting us, which I do not think would have been possible in the way it was without being in the same room at the same time together... I think it is essential that we continue to facilitate coming together as much as possible...Relationship development was crucial and was started during the 2 days.”

“I truly commend the organizers and participants for their work in this area and look forward to seeing this move forward--hopefully contributing in some way.”

“The Summit was very encouraging to me; I can see how a proactive approach to defining the path for health coaching under the Health Care Reform Act is essential to the integrity and future of this profession is essential. Thanks for organizing this.”

“The AI process was extremely well managed and delivered a clear focus to move forward differences in perspectives that were brought forth. There was strong and clear support and consensus on the need for a new professional category of ‘Health and Wellness Coach’.”

“[I was] surprised by the level of talent in the room and also by the enthusiasm for coaching as a modality that can contribute to improving the level of health in the population. The meeting created confidence that this group of people could really make a difference in the health care delivery model in this country. I was pleased to be a part of it.”

#### **Summit Background Materials (available on request)**

Summit Press Release

Leadership Team Bios

Summit Participants

PowerPoint Deck presented by Leadership Team

Existing Health & Wellness Coaching Training and Education Options

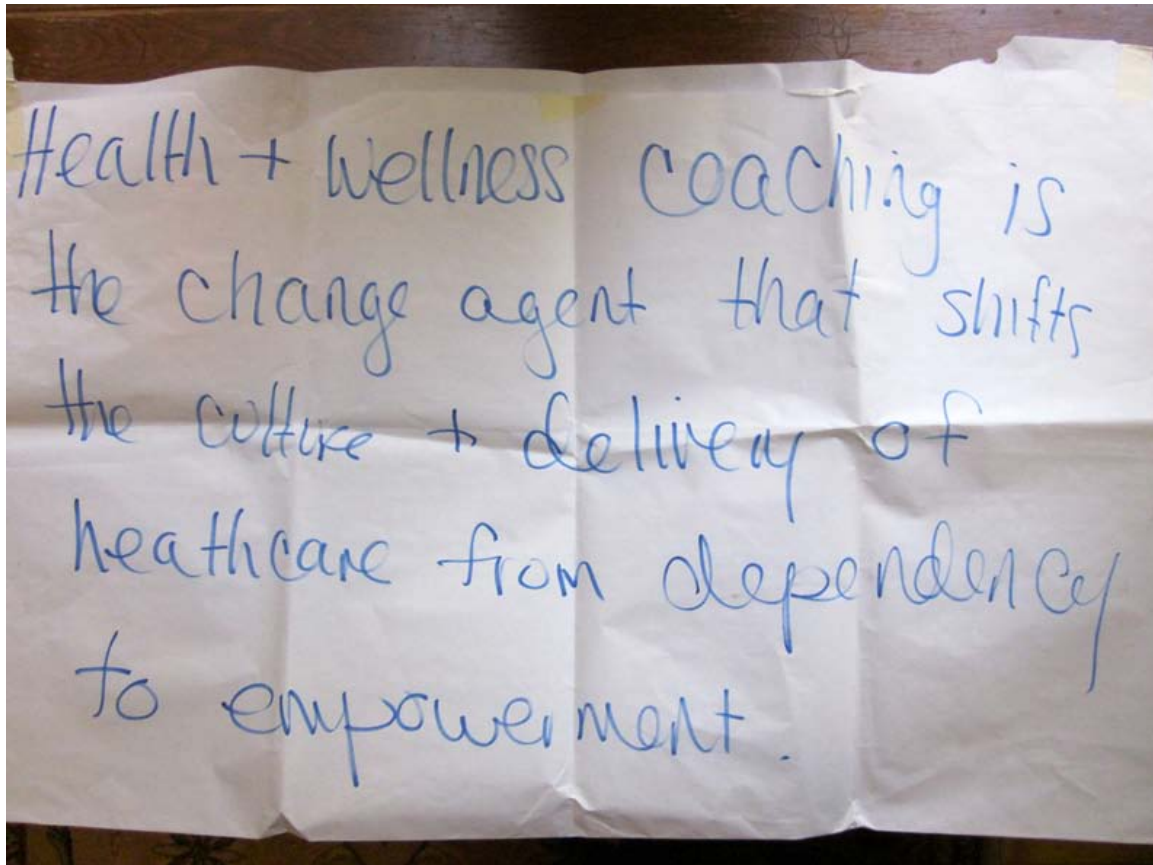
Paper on Best Credentialing Practices: Credentialing CAM Providers

American Holistic Nursing Association Task Force White Paper on Coach Credentialing

Summit Group Notes

Post-Summit Project Teams

**Summit Vision for Health & Wellness Coaches as Change Agents**

A photograph of a piece of white paper with handwritten text in blue ink. The paper is slightly wrinkled and has some yellow tape at the top edge. The text is written in a cursive, handwritten style.

Health + wellness coaching is  
the change agent that shifts  
the culture + delivery of  
healthcare from dependency  
to empowerment.

## **Appendix 4**

### **Participating Organizations**

1. American Association of Cardiac and Pulmonary Rehabilitation
2. American Association of Diabetes Educators
3. Academic Consortium for Complementary and Alternative Healthcare
4. American Board of Holistic Integrative Medicine
5. American College of Lifestyle Medicine
6. American College of Sports Medicine
7. American Holistic Nurses Association
8. American Holistic Nurses Certification Corporation
9. American Occupational Therapists Association
10. Apollo Group
11. AsOne Coaching Institute
12. Blue Cross Blue Shield of Massachusetts
13. Brown Mountain Visions
14. California Institute of Integral Studies
15. Case Management Society of America
16. Cleveland Clinic
17. Duke Integrative Medicine
18. GlaxoSmithKline, Inc
19. Harvard Vanguard Medical Associates
20. Healthcorps
21. Health Creation, UK
22. Healthy Howard, Inc.
23. Health Integrated, Inc.
24. Institute of Coaching, McLean Hospital/Harvard Medical School
25. Institute for Functional Medicine
26. Institute for Integrative Health
27. Institute of Lifestyle Medicine, Harvard Medical School
28. Integrative Health Consulting & Coaching
29. Integrative Medicine Institute
30. Integrative Nursing Institute
31. International Association of Coaching
32. International Coach Federation
33. International Nurse Coach Association
34. Iowa Chronic Care Consortium
35. JFK University
36. LifeTrek Coaching International
37. Logan College of Chiropractic
38. Mark Braman, MD, Belgium
39. Massachusetts General Hospital
40. Mayo Clinic
41. McLean Hospital/Harvard Medical School
42. Medica
43. Medical Fitness Association

44. Medical Wellness Association
45. National Board of Certified Counselors
46. National Institute of Whole Health (NIWH)
47. National Wellness Institute
48. Nightingale Initiative for Global Health
49. Optimal Health and Prevention Research Foundation
50. Osher Research Center, Harvard Medical School
51. PMP Media (Pam Peeke, MD)
52. Real Balance Global Wellness Services
53. RMIT University, Australia
54. RN Patient Advocates
55. Sacramento Center for Health and Healing
56. Sam Magill Coaching & Consulting
57. Samueli institute
58. Spaulding Hospital, Harvard Medical School
59. Society for Behavioral Medicine
60. Tai Sophia Institute
61. Take Care Health Systems, Walgreens
62. The Integrator
63. University of Arizona, College of Nursing
64. University of Bridgeport
65. University of California, San Diego
66. University of Minnesota
67. Vanderbilt University Medical Center
68. WebMD
69. Wellcoaches Corporation
70. Wellness Coaching Australia
71. Wellness Israel
72. Wellventures
73. YMCA of Central New Mexico