

# Wellness Coaching

## Supervisor Manual



# Wellness and Coaching

Mind

Spirit

Body

This manual was developed as a resource for the Peer Wellness Coach project, a Transformation Transfer Initiative (TTI) funded by National Association of State Mental Health Program Directors (NASMHPD). NASMHPD awarded a TTI grant to the New Jersey Division of Mental Health Services (DMHS) to collaborate with Collaborative Support Programs of New Jersey (CSP-NJ) and the University of Medicine and Dentistry of New Jersey, School of Health Related Professions, Department of Psychiatric Rehabilitation and Counseling Professions to develop and implement this project.

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## Overview

According to Gates and Akabas<sup>1</sup>, practices conducive to effectively integrating peer providers as staff of mental health agencies include: clearly defined job structure, adequate training, support and guidance regarding disclosure of peer status, and opportunities for networking and social support. Practices that seem to undermine successful integration include subtle discrimination based upon lingering stigma, role conflict, and role confusion among peer and non- peer staff. This manual contains information, resources, and strategies that we believe can help mental health agencies to successfully introduce the peer wellness coach role into the array of services offered. Although this manual is designed for direct *supervisors*, the strategies described may also help managers and administrators to effectively integrate the peer wellness coach role. Practical strategies for supervisors to effectively supervise the wellness coach are highlighted.

The first section defines the key wellness coach principles and core concepts (wellness and coaching), and presents key wellness coach tasks and ethical principles. The next describes the purpose of supervision, and outlines the process for setting up a supervisor-wellness coach relationship. Strategies for integrating a wellness coach into the team/agency culture and special supervision issues are highlighted. Section three outlines strategies for assisting the wellness coach in developing and refining core competencies. This section specifically addresses wellness assessment, responding to barriers, the coaching session plan, and a format for helping the wellness coach to selectively use self disclosure (known as wellness narratives). Section four explores special issues. The final section highlights the importance and benefits of assisting wellness coaches in terms of career development.

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<sup>1</sup> Gates, L., & Akabas, S. (2007). Developing strategies to integrate peer providers into the staff of mental health agencies. *Administration Policy Mental Health and Mental Health Service Research*, 34, 293-306.

## Section 1 -Wellness Coach: Core Concepts and Key Roles

This section will review:

- Definition of ‘Peer’ Wellness Coach
- Definitions of Wellness and Coaching
- Roles and Responsibilities of a Peer Wellness Coach

A wellness coach is a person trained to help peers (persons living with a mental illness, hereafter referred to as service recipient or peer) establish a link to primary health care and health promotion activities. The wellness coach can assist peers in reducing high risk behaviors and health risk factors such as smoking, poor illness self-management, inadequate nutrition, and infrequent exercise. Wellness and coaching principles assist the service recipient in making behavioral changes leading to positive lifestyle improvement. A wellness **coach** is someone who can help a *peer* set and achieve a wellness or health *goal by offering support and encouragement and asking questions to see what would be most helpful.*

A wellness coach can assist peers in the following ways:

- Focus on personal health and wellness strengths and needs,
- Brainstorm ideas about wellness goals and things they can do to achieve their goals,
- Help the peer find his or her [or “help peers find their”] own solutions for the health problem[s] and concerns that they may face by asking questions that help them better understand their personal situation
- Help a peer to set and achieve a goal, and
- Help peers find the motivation they need to complete the plan in order to achieve their wellness goals

## Definitions of Wellness and Coaching

*Wellness* is a conscious, deliberate process that requires a person to become aware of and make choices for a more satisfying lifestyle. A wellness lifestyle includes a self-defined *balance* of health habits: adequate sleep, rest, and good nutrition; productivity and exercise; participation in meaningful activity; and connections with people and communities that are supportive<sup>2</sup>. **Table 1 presents the wellness framework, including examples highlighting important aspects within the identified life domains.**

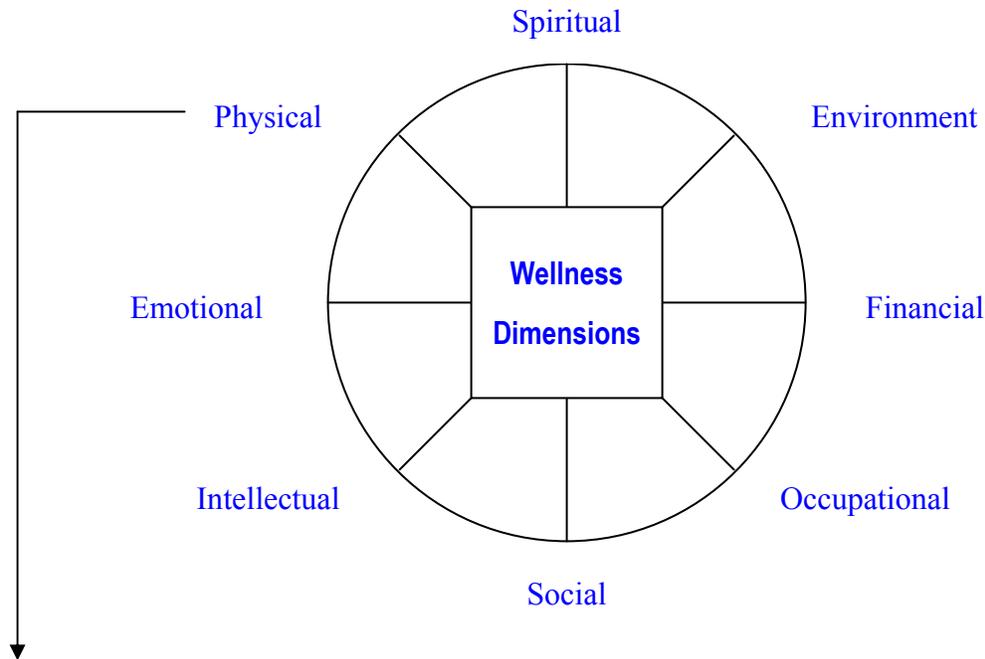
*Coaching* is a positive supportive relationship between the coach and the person who wants to make the change. This positive supportive connection empowers the person seeking change to draw upon his or her own abilities and potentials, so as to achieve lasting lifestyle changes. *Coaching* is not counseling or therapy. Therefore, a coach is not acting as a therapist, counselor, or mentor. Coaching does not require an exploration of past experiences or a need to gain insight into the problem or challenge. A coach does not provide a prescription, wisdom, or advice, but rather helps a person seeking coaching to define what is important and set a plan to accomplish a personally valued goal.

### *The Structure of Coaching*

- Help the person to clarify the problem/need for change or improvement
- Determine if there is a clear goal
- Brainstorm actions to be taken
- Determine the action
- Set an accountability step
- Set a time frame to accomplish the action

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<sup>2</sup> Swarbrick, M. (March 1997). A wellness model for clients. *Mental Health Special Interest Section Quarterly*, 20, 1-4.



Physical dimension examples: *Medical care, physical activity, sleep/rest, nutrition*

### **Roles and Responsibilities of a Peer Wellness Coach**

1. Assist peers in choosing, obtaining, and keeping wellness and healthy lifestyle related goals.
2. Help peers work through the process of identifying a health and wellness related goals.
3. Ask facilitative questions to help peers gain insight into their own personal situations.
4. Empower peers to find solutions for health problems and concerns they are facing.
5. Help peers to find their own solutions, by asking questions that give them insight into their wellness status.
6. Assist in identifying steps to take to achieve a health and wellness related goal.
7. Assist peers in strengthening their readiness to actively pursue health and wellness.
8. Use a variety of methods, tailored to the individual, to move through the process of setting and reaching health and wellness related goals.
9. Provide structure and support to promote personal progress and accountability.
10. Compile and share wellness and healthy lifestyle resources for peers and other staff or supporters.
11. Selectively use self disclosure to *inspire and support*.

A key task of the wellness coach is to help the person served explore the eight wellness dimensions so that person can better understand his or her experiences, motives, and needs. The wellness coach then generally helps the peer focus on physical wellness domains that contribute to overall balance and health, (including perception of overall physical health nutrition, activity, sleep/rest, relaxation, stress management, environment, and medical care/screenings that can help contribute to overall balance and health).

A large number of adults living with mental illnesses are becoming seriously ill and dying at a premature age, even while under the care of the mental health system. They are developing chronic medical diseases that significantly shorten their lives. People with psychiatric disabilities have limited access to medical care and experience undiagnosed and/or untreated medical conditions that often lead to premature mortality and/or poor quality of life. A man living with serious mental illness (under the care of the public mental health system) can expect to live to 53 years of age, whereas a woman can expect to live to 59. This represents a 25 year shorter average lifespan than the general population.

Many premature deaths are due to medical conditions such as cardiovascular, pulmonary, and infectious diseases. The following are troubling conditions that affect the quality of life and quantity of years lived: circulatory disease, metabolic conditions including diabetes, obesity, hyperlipidemia, osteoporosis, chronic pulmonary disease, HIV-related illnesses, and dental disease.

Of particular concern among this group of people is the occurrence of the metabolic syndrome. The *metabolic syndrome* is a cluster of symptoms that increases an individual's risk for diabetes mellitus and coronary heart disease<sup>3</sup>. These symptoms include abdominal obesity (increased waist

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Kelly, D.L., Boggs, D.L., & Conley, R.R. (2007). Reaching for wellness in schizophrenia. *Psychiatric Clinics of North America*, 30, 453-479.

circumference), elevated triglycerides, elevated high density lipoprotein cholesterol disorder, hypertension, and elevated fasting glucose<sup>4</sup> .

These serious health problems are frequently caused or worsened by lifestyle factors such as lack of physical activity, smoking, limited access to adequate healthcare and prevention services, poor diet and nutrition, substance abuse, and residence in group living situations with the consequent exposure to infectious diseases. Other issues include:

- Psychotropic medications that mask symptoms of medical illness and contribute to symptoms of medical illness,
- Lack of coordination between mental health providers and general healthcare providers, and
- Second generation antipsychotics that have been highly associated with weight gain, diabetes, dyslipidemia, insulin resistance, and the *metabolic syndrome*.

The wellness coach role is designed to focus on wellness, particularly the *physical dimensions*.

A peer wellness coach applies principles and processes of professional life coaching to the goal of lifestyle improvement for higher levels of wellness<sup>5</sup>. There is a specific focus on the relevant physical health factors previously identified as problematic for persons living with serious mental illness including: low levels of physical activity/sedentary lifestyle, the use of tobacco and other addictive substances, and the lack of nutrition and dietary education, diet and glucose monitoring for diabetes prevention and management, oral hygiene/dental health practices, and HIV/AIDS education.

Wellness coaching emphasizes collaboration; the coach helps to guide the person toward successful and long lasting behavioral change (Swarbrick et al., 2008). Wellness coaches provide

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<sup>4</sup> Kelly, D.L., Boggs, D.L., & Conley, R.R. (2007). Reaching for wellness in schizophrenia. *Psychiatric Clinics of North America*, 30, 453-479.

<sup>5</sup> Swarbrick, M., Hutchinson, D., & Gill, K. (2008). The quest for optimal health: Can education and training cure what ails us? *International Journal of Mental Health*, 37 (2), 69-88.

ongoing individualized support and reinforcement. In this context, a coach is a person who supports peers in achieving their goals with encouragement, and questions.

Unlike a *counselor or mentor*, a coach rarely offers advice; rather the coach helps the peer brainstorm ideas. Coaching does not include giving the solution for the problem, but will energize the peer to solve the problem. The coach helps the peer to find their own solutions, by asking questions that give them a better understanding of their situations. A coach holds the peer accountable, so if a peer agrees to a plan to achieve a goal, a coach will help motivate him or her to complete plan. A coach uses a variety of methods, tailored to the peer, to move through the process of setting and reaching goals. The wellness coach helps to guide the peer toward successful and durable behavioral change. Coaches apply principles and processes of professional life coaching to the goal of lifestyle improvement<sup>6</sup>.

A critical aspect of coaching is self-responsibility. Peers seeking coaching should accept responsibility for where they are in their own life, including their health. Through coaching, a person can determine what s/he is responsible for and become empowered to take the action to improve his or her wellness status, in terms of the eight dimensions of *wellness: spiritual, emotional, physical, occupational, financial, environmental, intellectual, and social*.

In summary, the wellness coach role provides support in the form of coaching to: 1) help the individual work through the process of developing a wellness-related goal, 2) assist in identifying steps to take to achieve goal, 3) provide structure and support to promote personal progress and accountability, 4) support direct skills teaching or training, 5) assist the individual in strengthening readiness to actively pursue the wellness related goal, and 6) compile and share wellness and healthy

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<sup>6</sup> Swarbrick, M., Hutchinson, D., & Gill, K. (2008). The quest for optimal health: Can education and training cure what ails us? *International Journal of Mental Health*, 37(2), 69-88.

lifestyle resources for service recipients and program staff. Peer wellness coaches also selectively use self-disclosure to inspire and support.

## Section 2: Supervision

### This section will explore

- Where does a wellness coach fit?
- Definition of supervision
- Helping peers to develop a *Wellness Coach Identity*

### Where a Coach Fits

Wellness coaches are obviously not practitioners of the healing arts with a licensed credential, such as physicians, dentists, nutritionists, registered nurses, or physician's assistants. They do not need to have advanced formal training in rehabilitation, social work, psychology, or related fields.

These front-line workers do have the training and are developing the skills to help a person with a serious mental illness make and implement choices around health improvement and health maintenance. For some kinds of health maintenance, they are helping their peers come to the appropriate credentialed professionals for services. In other cases, their actions help a person choose a course of action that does not require professionals help, such as:

- Diet improvement
- Tobacco reduction or cessation not requiring detoxification or medication),
- Increase in activity for a person with no major health condition, and
- Various wellness improvements outside of the physical domain (employment, education, finance, etc.)

Wellness coaches may need to interact with health professionals both *alongside* their peer-clients, and sometimes on behalf of their peer-clients. An example of the latter is that a wellness coach might ask a nutritionist whether a person's chosen diet sounds medically safe, or whether if that person needs help getting professional assistance. While wellness coaches are not likely to work as medical auxiliaries or extenders in the traditional sense (performing diagnostic or therapeutic procedures as

prescribed by a physician), there are obvious cases where they will be bridging the gap between peer-client and physician by helping the peer with health data gathering, self-administration of medication, or a similar task.

As a supervisor, together with your staff wellness coaches, you need to educate health professionals regarding:

- What the wellness coach can and will (and can or will not) do,
- That the wellness coach role should not be overlapping or usurping the role of treatment professionals,
- That the organization is committed to using wellness coaches, and
- That the wellness coach should be a valuable extension to their role.

In addition, both wellness coaches and other health professionals need to operate on mutual respect and, as the supervisor, you may need to enforce that expectation of respect and cooperation.

Peer providers are members of a service delivery team who have defined responsibilities and roles, and who contribute to the bottom line of the team, which is providing efficient, effective, and appropriate mental health services to the team service recipients. It is likely that maximum integration occurs when the peer provider is given clear and meaningful roles and responsibilities. Involving a peer provider in a meaningful role has the following advantages:

- Offers the team a special services from the lived experience,
- Increases the team members' sense of value and respect, and
- Sends a positive messages to other team members, regarding the belief in recovery and wellness.

Modeling is something that supervisors and colleagues all do, and probably does not call for special changes for an employee who is assuming the peer wellness coach role. Being professional, timely with deliverables, respectful of individuals, and respectful of one's self are characteristics that supervisors model for supervisees and colleagues, which are not likely to change due to the presence of

a peer wellness coach. A peer wellness coach is expected to arrive at work on time, meet deadlines, and be respectful—just like any other employee. Direct communication of job duties and expectation for the peer wellness coaches essential, and represent good employment practice in general.

Peer provider employees are employees in a full sense. They should not be deprived of any participation offered to all other care providers on the team. Excluding peer providers from a subset of team meetings, or from trainings open to all other team members, has the potential negative effects of demeaning the value of the wellness coach, communicating disrespect, and perpetuating stigma.

Regrettably, some employers do report that a small subset of their non-peer workforce does not value peer providers as team members or colleagues; some even ignore management directives-to integrate their activities with their peer provider colleagues. Supervisors expect and report cohesive team-building, must hold staff accountable in this regard before it results in reduced productivity, reduced employee morale, and/or legal exposure.

Social integration is important to any new employee, especially to a person in recovery who already feels a sense of “differentness” and possible self-stigma. Integrating oneself into a team of colleagues is even more challenging when team members believe there is a “differentness” about the individual. Obviously, a supervisor or employer cannot mandate friendship or require invitations to share lunch or similar social activities. However, the supervisor can and should lead by example, making sure that the peer provider is made as comfortable as possible in the social fabric of the workplace.

Quality improvement outcome indicators and metrics are generally set at an agency level. They reflect the agency-wide Quality Assurance/Program Improvement (QA/PI) effort, as well as specific measures and metrics needed to ensure compliance with contracts, regulations, and the requirements imposed by third-party payers. They may also involve the interface between practice and research, both to the extent that they focus attention on issues that research identifies as important, and to the

extent by which they enforce collection of data elements important for research and evaluation. At the front line, supervisors will need to be concerned with some or all of the following aspects of data collection in order to ensure that:

- Data are collected, including baseline data collected of service recipients' health status, and assure that meaningful subjective evaluation data are not overlooked. Measures of subjective experience, such as Quality-of-Life (QOL), Health Quality of Life (HQOL), and service recipient satisfaction should be part of the data collected to examine the impact of the wellness coaching service, and
- At the same time, data collection does not become too big a burden. While QA/PI data is important, it is equally important that data collection not overshadow the important direct work of the wellness coach, or the other work of the team.

Good human resources practices benefit all employees and should include consistent performance standards, clarity about essential elements of each job, knowledge and practice regarding accommodations and the ADA and state anti-discrimination statutes. Crafting workable policies needs to include attending to preventing potentially harmful dual relationships between employees as well as between employees and service recipients.

### **Definition of Supervision**

Supervising people with disabilities is, in most ways, exactly like supervising people without disabilities. Effective supervision is critical for successful employment of persons in recovery. After recruiting, hiring, and orienting a new employee, any ongoing issues such as job and role clarification, expectations, and performance; confidentiality; disclosure; dual roles; and working as a team member can be readily addressed in supervision <sup>7</sup>.

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<sup>7</sup> Gates, L., & Akabas, S. (2007). Developing strategies to integrate peer providers into the staff of mental health agencies. *Administration Policy Mental Health and Mental Health Service Research*, 34, 293-306.

Supervision is a dynamic process by which a worker who has direct responsibility for carrying out a program in an agency (the wellness coach) is helped by a designated responsible staff person (the supervisor) to make the best use of knowledge and skills so as to perform the requirements of the position effectively. In this context, the purpose of supervision is to help the peer staff to be resourceful and effective in performing his/her work duties (i.e., the position requirements and duties of a wellness coach).

Supervision works well as a reflective process whereby the supervisor helps the wellness coach to examine his or her performance and continue to develop and refine his or her abilities to perform duties as effectively as possible. In order to accomplish this, both the supervisor and the wellness coach need clear expectations. Therefore, a *position (or job) description* should be provided, and clear performance evaluation reviews should be performed at pre-determined intervals. An example of some key wellness coach tasks appear in Appendix A. Appendix B includes suggested Code of Ethics.

The supervisor is responsible for creating an environment for learning and growth. The following supervisory tasks are used to accomplish this goal:

Supervisory Tasks
<ul style="list-style-type: none"> <li>• Create a supportive environment in which the wellness coach is encouraged to learn and develop the capacity to apply and refine skills,</li> <li>• Promote a stimulating environment that involves questioning and reflective practice</li> <li>• Help the wellness coach to identify strengths and areas for growth and set goals to develop and refine skills and abilities,</li> <li>• Treat the wellness coach as a mature responsible adult, and</li> <li>• Be willing to give regular constructive feedback</li> <li>• Actively request-feedback from the wellness coach.</li> </ul>

**Supervision versus support – How to supervise supportively**

Supervision *is not* support, but supervisors can provide supervision supportively. The supervisor can make the wellness coach feel comfortable in the work environment, so as to see it as a learning environment as well. The effective supervisor will help the wellness coach draw on personal experience and focus on developing relevant skills to meet the requirements of the job.

It is important to understand that the supervisor is *not a therapist* for the peer wellness coach employee. Supervisors cannot and should not provide therapy or other mental health services in the supervisor role. Supervisors do need to be available to provide direction and assistance with job duties, provide feedback regarding job performance, lead team meetings, and handle clinical issues.

Supervisors in mental health and human service work are generally caring people who want to see a supervisee get help. It is important, due to workplace boundaries and privacy needs, not to address issues personally, but rather to follow company/agency policy and refer staff to the Employee Assistance Program (EAP) if a person is encountering mental health issues impacting the performance of work responsibilities.

Supervision meetings often must address both administrative issues and reflective clinical issues relative to the ability of the peer wellness coach to effectively work with persons served. The following are typical agenda issues for the supervision meeting:

- *Professional issues*- ethics, values, time management
- *Education/Growth*- skills development and sharing of resources and assisting with accessing resources
- *Relationships* with co-workers
- *Management issues*- general agency policies and procedures
- *Personal issues*- challenges getting in the way of performing duties or factors that can improve performance and wellness

## **Boundaries**

Think of the “boundary” line for your supervision relationship. Using the metaphor of a cell membrane. Some things need to pass through the cell membrane for the cell to stay alive, and other things need to be kept out or kept in. In order for this selective transmission to occur, the cell membrane is semi-permeable (some things pass through and some don’t). Similarly, the boundary of the supervision relationship needs to keep some things in (e.g., the principle of confidentiality) and keep some things out (e.g., restricting the focus to exclude overly personal issues). However the “semi-permeable” metaphor goes only so far, as you cannot necessarily include or exclude whole classes of content, because the supervisee’s stage of development, learning needs, and personal circumstances will influence your decision about what comes in and what goes out.

Content boundaries refer to the types of things that you deem eligible for discussion in supervision, and use “process boundaries” to refer to acceptable behaviors within the supervision relationship. Both sets of boundaries need to be clarified (minimally) at the beginning of a supervision relationship as part of orienting the new supervisee.

The most obvious content boundary is deciding on the focus of supervision....Another type of content boundary is drawing the line between what is “supervision” and what is “therapy”—an easy conceptual distinction that can be difficult to draw in actual practice. Different theoretical models of counseling and supervision (e.g., behavioral vs. psychoanalytic) will draw this line in different places, and differences in placing this boundary also may exist across individuals, service organizations, professions, and academic training facilities.

Most supervisors play multiple roles. Two roles are often seen as primary components of supervision in human services: administrative supervision and clinical supervision. These two roles are both complementary and contradictory. They are easy to distinguish in concept, but not so simple

to disentangle in actual practice. Bradley and Ladany (2001)<sup>8</sup> distinguish the two as differing in emphasis, but being “closely linked in daily practice” (p. 5). Administrative supervision, they say, focuses on organizational efficiency, with all of the performance measures and required tasks implied by concentrating on the organization or agency. Clinical supervision, on the other hand, focuses on the client and on the developing relationship between the supervisee and the client.

### **Performance**

Again, the main role of a supervisor is to provide the wellness coach guidance and direction, not therapy. As mentioned above, a clear specific job description and an associated performance evaluation tool are critical for success. Job (or position) descriptions clarify the boundaries for the peer coach and the supervisor, and thereby should help the peer to competently perform duties and responsibilities. Expectations should be explicitly stated, recorded in writing by the supervisor, shared with the employee, and signed by both. The written job description and employment contract form the basis for structuring a supervision session and create the parameters for the supervisor-wellness coach relationship. Appendix C includes key factors in creating a *Good Job Description*.

If no job description or employment contract exists, development of these documents is a top priority. Whether being created or changed, the job description under development should be reviewed and adjusted by an incumbent worker whenever possible. A wellness coach on the job will have the best idea of what the job entails. If you are creating a new position, and do not have an incumbent wellness coach on staff, you might consider consulting with a wellness coach working for another team, program, or agency about the critical competencies and duties of the job role. ‘

### *Universal Design*

Peer wellness coaches should be treated like any other employee, so it is expected that

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<sup>8</sup> Bradley, L.J., & Ladany, N. (2001). [Counselor supervision: Principles, process, and practice](#). Philadelphia: Brunner-Routledge.

company/agency personnel policy, practices, and forms will meet these needs. The concept of universal design applies here. Universal design is the design of products and environments to be usable by all people, to the greatest extent possible, without the need for adaptation or specialized design. The following are universal design principles<sup>9</sup> as they relate to human resources practices: Equitable- relevant to all employees; Flexible- Accommodates a wide range of needs; Simple and intuitive- Easy to understand; Informative- Explains how to implement; Tolerance for error- Minimizes misuse / abuse; Affordable- Options provided are within budget.

### **Helping Peers Develop a Wellness Coach Identity**

#### Define Wellness Coaching for Staff and Persons Served

1. Coaching is holistic and focuses on all aspects of health and well-being: physical, intellectual, social, environment, financial, spiritual, occupational, and mental/emotional.
2. Coaching is a partnership. When you work with a coach you have someone who helps you focus on the goals you want to achieve and develop strategies to be sure you reach them. Coaching helps you take action in your life; so after each coaching session you will apply what you learn and create something new in your career or in your life. With a coach, you will make clearer decisions and build a life that best matches who you really are. You gain clarity, focus and support to be the best you can be
3. **Examples:** As a “*Wellness Coach*” I partner with a peer to help deal with obstacles by choosing to emphasize strengths and focus on wellness and fulfillment in the wellness dimensions.
4. When you work with a wellness coach you have someone who helps you focus on the goals you want to achieve and develop strategies to be sure you reach them.
5. Wellness coaching is about taking *action* in your life; so after each coaching session you will apply what you learn and create something new in your career or in your life.

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<sup>9</sup> adapted from *UD Principles (Center for Universal Design, NC State University)*

***Purpose of a Wellness Coach Role***

a. Confirming the reason you are coaching and the desired outcome helps both partners understand:

- 1) Why it is better to have to people working toward the goal
- 2) Staying focused on solutions enhances thinking
- 3) Brings the focus from the problems to the solutions/goals

**A wellness coach is not a therapist, counselor, guru, mentor, or consultant.**

Therapist – You do not have to figure a person’s past experiences

*How does that fit into who you are now?*

Counselor – You do not need to guide people through to insight

Coaching focus is on action

*What do you want to experience?*

*What is your game plan?*

Guru – You are not responsible for providing wisdom

Coaching helps people take responsibility

*What will you do next time?*

*How do you think that will work for you?*

Mentor – you do not have to be responsible for teaching

A coach believes the answer comes from within the person

*What is your back up plan?*

*What works for you?*

Consultant – You do not have to have all the answers

Coaches partner with people to find answers

*How does that idea fit with your values?*

How would you have to change your thinking in order to do that?

## Section 3 – The Skills of Wellness Coaching

This section will highlight

- Assessment Skills
- Communication Skills
- Elements of Coaching
- Disclosure: Creating Wellness Narratives

### Assessment Skills

There are a variety of assessment process, tools, and responding skills used by wellness coaches when helping a person to set and achieve a wellness goal. Appendix D includes a wellness planning tool that can be useful to help a person explore priorities. Once priorities are set, then a wellness coach can help the persons set a wellness goal. These assessments (and good communication skills) are key skills for the wellness coach to be able to effectively listen to the person's needs and desires.

### Communication Skills: Active Listening and Engagement

In addition to coaching strategies, a wellness coach should have good communication skills. It is especially important for coaches to have an effective ability to actively listen to and engage their client, in order to help the person become aware of and make choices for a self-defined lifestyle.

Active listening is an important concept. It refers to the ability of one person to truly listen to and understand the content of what is being said and feelings of another person. Active listening involves being fully present and aware of what someone is saying and feeling.

**Engagement techniques** are skills and behaviors that are used to encourage persons served to become involved in a dialogue. These techniques range from asking an open-ended question to other skills. These are skills that take time to develop. Coaches should refine them on an on-going basis. It is

important to note that there are different engagement techniques that can be used for different situations. The following are examples of some engagement strategies a wellness coach may consider:

- Ask an open-ended question (e.g., “Mary, what do you do to feel physically well?”).
- Summarize what they person has said (e.g., “Mary, I hear you saying that you are having difficulty managing your diabetes.”).
- Smile and have a sense of humor when appropriate.
- If the person does not want to participate right away, allows that person to wait until he/she is comfortable enough to participate (be comfortable with silence).

Engaging a person means getting that person to take his/her place as a partner in the coaching process. The benefit of engaging someone is that both parties can focus on what they want from the session. Some effective skills used for engaging are acknowledging and affirming, asking questions, and responding.

**EXAMPLE:**

Andrew just returned from a completing a physical examination, after not having had a full exam in nine years) and was informed that he had borderline diabetes and high blood pressure, which are risk factors for metabolic syndrome. Andrew feels quite overwhelmed, and realizes that he will need some support. He approaches the coach and asks:

*“I have thought about talking to you but uh... What does a wellness coach do?”*

**Acknowledge**-- the opportunity to give credit to the person for what they have already done.

*“You are asking questions about wellness coaching. You have already taken the first step!”*

**Affirm** –establishing a positive context for a feeling or action

*“It seems quite natural that you would feel overwhelmed and concerned about your health”*

**Ask a good open ended question** to helps the person describe to you what he needs or wants.

- What really bothers you about this?
- What would you like to do about this?

**Focus on a Vision** -- help people served to imagine the future.

- When people think about their future they are in creative mode.

- *How would you like to feel 3 months from now?*
- *If you could be granted a wish, what would it be?*

**Respond-** by paraphrasing or summarizing what the person has said. This helps the person know you are listening and builds trust

- This is how you keep the peer's agenda!

“It sounds like this news is quite overwhelming. You are looking for some support.”

## The Coaching Session

**Designing the coaching process means helping the person understand what the process is by following his/her lead, talking about only what he/she is ready to talk about.**

## Coaching Session

- Setting a goal based on the information from assessments and the session
- Walking the peer through the steps to inspire and confirm the plan is doable
- Using the format for an initial or regular coaching session
- Setting a time frame for the session
- Scheduling the next session
- Documenting the session

## Some things to consider

- Focus on what is working (*strengths*)
- Identify internal barriers such as limiting beliefs
- Discuss external barriers such as lack of resources
- Compare the risk of status quo with the risk of progress
- Consider Cultural issues
- Ask permission
- Brainstorm to provide enhancement for decisions
- Reinterpret issues
- Share personal experience and knowledge

**The following are some questions supervisors can review during every regularly scheduled supervision meeting:**

- How have you been able to use these in your coaching interactions this week?
- When were you not able to use of any of these skills?
- What got in the way?
- When are these most useful?

### Other questions for discussion:

- What are the barriers to using coaching techniques?
- What are the benefits to using coaching techniques?
- Review Appendix E: Core Wellness Coaching Skills and Techniques

### The structure of a coaching session:

#### Initial Session:

<b>Clarify:</b>	What is coaching? - What coaching is NOT.
<b>Define roles:</b>	Who is responsible for what?
<b>Plan:</b>	The duration and frequency of the sessions
<b>Create:</b>	A wellness plan using assessments
<b>Focus:</b>	On a goal
<b>Determine:</b>	The first step
<b>Decide together:</b>	On an accountability step
<b>Leave:</b>	The person knowing exactly what the next step is
<b>Prepare:</b>	For the next session

#### Regular Session:

<b>Connect:</b>	Use open ended questions and responding skills to understand the person's challenge or desire.
<b>Acknowledge:</b>	Any effort the person makes toward coaching.
<b>Focus:</b>	On the assessment, goal and the steps to get there.
<b>Determine:</b>	If the goal and steps are clear: if not brainstorm.
<b>Decide together:</b>	On the next step
<b>Set:</b>	An accountability step. (What, by when, How will I know ?)
<b>Confirm:</b>	Next appointment

***Disclosure: Creating Wellness Narratives***

*Wellness Coach Task* “Selectively use self disclosure to *inspire and support*”

Self-disclosure is an approach to sharing information about yourself so you can be “seen” more easily. By sharing a little bit about who you are, another person can relate to you more effectively. Self-disclosure is an important aspect of forming or sustaining an effective helping relationship. Self-disclosure is a counseling skill that can be used for better or worse to facilitate counseling and/or supervision. Jourard<sup>10</sup> states that judicious use of self-disclosure improves working alliance. By sharing something about myself, I become a real person, a human being, which fosters an “I-Thou” rather than “I-It” relationship, and meets the Rogers criterion of “genuineness,” one of his facilitative conditions (see Bernard & Goodyear, 1992, pp. 18-19). However, in supervision as in counseling, the self-disclosure must be in the service of the other person’s learning. In supervision, supervisor self-disclosure should facilitate supervisee growth and learning, not change the topic or serve solely to glorify the supervisor. Self-disclosure is a particularly useful tool when you hope to introduce an alternative perspective or an option for action that the supervisee has not yet considered: “When I was a graduate student and had a similar experience, I also felt hurt, but I was angry, too!” There are other ways to do this, of course, such as attributing the experience or feeling to another supervisee or to “other people” in general, as in, “Some people in that situation might feel angry, too.”

How do you use self-disclosure as a counselor and as a supervisor? Would you be willing to share your answers to some of these activities with your supervisees? How about sharing any of these answers with a client? Where are your own personal privacy lines? Under what circumstances would

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<sup>10</sup> Jourard, S.M. (1964). [The transparent self](#). Princeton: Van Nostrand

you be willing to cross those lines and share personal information with a supervisee and/or a client?

Do you expect more or less information from your supervisee than you are willing to provide?

Peer wellness coaches are urged to consider, the following suggested guidelines:

1. Develop a personal wellness plan and make a commitment to follow it in order to be effective at work.
2. Develop a strong support system, especially outside of the work setting.
3. Continue to use the wellness tools and recovery skills that have helped and continue to further develop wellness tools
4. Continue with treatment if it is helpful

When planning to disclose aspects of your being a mental health peer, it is important to remember the following:

- How would this be helpful to the person I am supporting?
- What difficulties might be created by my self-disclosure?
- Am I using this as an opportunity to vent because I feel distress about the situation, or because of some other personal need?
- Am I looking for the person I support to solve my problem?
- Am I sharing this because I do not know what to do and I need to fill in time?

If you are struggling with a problem (e.g., trying to stop smoking), it is okay to perhaps share your struggle, but you must remember that your role is to inspire the person you are supporting to have hope and take action. It is very important to share information that will inspire hope and hopefully leads to action. This is a skill and an art and needs to be practiced and refined through the support and guidance of a supervisor.

Since a key wellness coach task is to selectively use self disclosure to inspire and support, it is very important that a peer wellness coach continually refine and continue to enhance his or her selective use of self disclosure through supervision and support. Wellness coaches are encourage to write, practice, and refine sharing wellness narratives in bite-sized segments so that, when working

with a peer, they can selectively share information that will be useful and relevant.

The following is a suggested format for developing, refining and enhancing a wellness narrative.

Much of how we live in **recovery** has to do with being an active decision-maker in the important areas of our lives. There are many aspects that define who we are as people, and we can look at them through all of our life dimensions: physical, spiritual, social, mental/emotional, intellectual, environmental, financial, and occupational. When sharing our wellness narratives, we need to look at ourselves differently; as less of a victim who struggles and more as a hero who has survived.

Personal successes offer hope and influence how we see ourselves and how we recognize our strengths and talents. This can have a profound impact on peers we support. A key aspect of peer wellness coaching is to share wellness narratives to inspire hope and encouragement. The following is a structure for helping to develop and refine wellness narratives in order to share selected segments that will be useful and inspiring

#### *Wellness Narrative*

It is important to write and practice when and how to share a personal wellness narrative. The focus should be sharing the brief narrative from a wellness-focused perspective. For example, a person may share how s/he learned to pay more attention to routines and habits that may be triggers, such as how s/he learned to pay more attention to his/her sleep habits.

#### *Process*

Spend time reviewing the wellness dimensions. Record your thoughts in the context of your recovery narrative and a *specific dimension*. It is important to record, share, and refine a narrative for all of the dimensions (one short narrative at a time).

- Present your **struggles and strengths** within the dimension. Share your action steps that have helped you survive and prevail.

- **Turning points-** describe the experiences that led to hope and helped you start making positive changes in terms of your own recovery.
- **Tools-** identify tools or resources you discovered that helped you make positive change. Identify solutions and tools that helped you get through times to where you are now.
- Describe **accomplishments-** the things in your life you have because of hard work you have done.

The goal is to write and practice narratives in short 4-5 minute segments. The supervisor can review these short segments during supervision. The supervisor can spend time reviewing these segments, e.g., help the wellness coach identify when each would be most appropriate to share, and when each might create a risk.

## Section 4- Special Issues

The following are some issues that we often hear from people in the field who have attempted to integrate peer providers into the staff of mental health agencies.

- When would it be considered crossing over the line of becoming the peer wellness coach's personal therapist instead of his/her supervisor?
- What happens if you start receiving calls from the wellness coach's therapist telling you that this job is destructive to his/her health?
- Your own personal information and/or learning personal information about the wellness coach
- What does it mean to be a role model/mentor while maintaining the integrity of the supervisory role?
- What about disciplinary action? When is it warranted?
- How do you set standards for reasonable accommodations for a peer wellness coach when you have several working for you—all with different needs and backgrounds, etc?

As stated in this manual, we strongly believe that supervising people with disabilities is very much like supervising people without disabilities. Supervisors and employees should be aware of the provisions of Title I of the American Disabilities Act (ADA), which requires employers with 15 or more employees to provide qualified individuals with disabilities an equal opportunity to benefit from the full range of employment-related opportunities available to others. For example, it prohibits discrimination in recruitment, hiring, promotions, training, pay, social activities, and other privileges of employment. It restricts questions that can be asked about an applicant's disability before a job offer is made, and it requires that employers make reasonable accommodation to the known physical or mental limitations of otherwise qualified individuals with disabilities, unless it results in undue hardship.

Basic elements of the ADA's protections are that:

- Accommodations are individualized,
- Accommodations can be requested by an employee who discloses a disability, or be proposed by an employer,
- There is no requirement for an employee to disclose a disability in advance of requesting an accommodation,
- Reasonableness tests are imposed, which generally rule out accommodations which cause undue hardship on the employer or change the essential nature of the job,
- Casual and common-sense accommodations certainly can and should be sought at the front-line levels, and may not need the involvement of upper management and the personnel department, and
- Vocational Rehabilitation professionals can play a role in developing accommodations, including job parsing and the selection, acquisition, and utilization of assistive technology.

Reasonable accommodations are an important part of good human resources practice, and also merit specific consideration. Offering accommodations can be very beneficial to agencies in retention of well-performing employee. Flexibility and reasonable accommodations can improve the workplace and enhance staff motivation. These are accommodations that most good supervisors afford many employees including those individuals who do not have a disclosed disability.

**An excellent employer resource on accommodations is the Job Accommodation Network (JAN)**, a free service that provides information on job accommodations and the employment provisions of the Americans with disabilities. JAN is a service of the Office of Disability Employment Policy (ODEP), provides a free consulting service for employers that expands employment opportunities for individuals with disabilities. They offer individualized worksite accommodation solutions and technical assistance with the Americans with Disabilities Act (ADA) and other disability-related legislation. JAN also educates about self-employment and small business ownership opportunities for individuals with disabilities. [www.jan.wvu.edu](http://www.jan.wvu.edu)

Open discussion and guidance regarding boundaries focused on the agency code of ethics is important. Ongoing communication in these areas can avoid confusion and help a peer to perform the role of wellness coach effectively. A clear position description and performance evaluation process can be the key to effectively working with peer providers. Regularly scheduled supervision that focuses on staff competency and growth will form the basis of a supervisor-supervisee relationship that aims to support a peer wellness coach in their roles. In addition organizations may need to review and strengthen their human resource policies and practices in general, and ensure that policies related to confidentiality are applied consistently and fairly to employees who are persons in recovery. Failure to apply such policies and procedures to peer employees can undermine just as easily as applying policies and procedures in a discriminatory manner.

Every employer should have clear-cut guidelines for when any-employee may benefit from referral to the Employee Assistance Program (EAP) or other counseling, and when employee behavior would result in a mandatory referral. Neither an employee's disclosed psychiatric condition nor a supervisor's mental health credentials and experience are appropriate reasons for counseling to be given in-house when it should be referred outside of the organization. Supervisors should be aware of agency policies regarding referring employees for EAP.

## Section 5 - Career Development

The wellness coach training curriculum offered by University of Medicine and Dentistry of New Jersey (UMDNJ) School of Health Related Professions (SHRP), Department of Psychiatric Rehabilitation and Counseling Professions provides an excellent opportunity for persons in recovery to gain knowledge, skills, and support to contribute to the workforce effort to promote quality of life for persons living with mental illnesses. Learning does not stop after the coursework is done. An ethical standard for wellness coaches is the pursuit of on-going training and support. Wellness coaches are expected to continually develop and refine the core skills: wellness, communications, coaching, peer support, and general knowledge of health, wellness, and available resources. Supervisors and administrators should also encourage wellness coaches to explore career development opportunities. Supervisors and administrators can provide a supportive environment where wellness coaches can grow personally and professionally.

Appendix C is an excellent checklist of the core wellness coaching skills and techniques. Competency requires continual focus on further developing and refining skills and keeping abreast of new and emerging knowledge, resources, and scientific advances.

As part of supervision and performance reviews, wellness coaches should be encouraged to set plans for personal and professional advancement. Like most employees, most wellness coaches will want to develop in their careers, both in-position (through developing and enhancing their skills and responsibilities), and potentially out-of-position (as they seek other positions in their current or other organizations which provide them challenge, satisfaction, increased responsibility, and increased compensation). Some peer providers have limited academic preparation. Pending regulatory changes,

this may limit the positions they can hold in an organization. Others may have suitable credentials in mental health to move quickly into other positions in the organization.

Wellness coaches, like all employees, have a reasonable expectation of being given the same career development support as any other employee. This includes inclusion in appropriate trainings, regular career development reviews, tuition reimbursement, and any other career development support that their colleagues receive.

Like most employees, most peer providers want *careers* rather than *jobs*. It is reasonable for such individuals to consider their current role of wellness coach as one in a continuum of positions in the field. At the organizational level, it will be necessary to ensure that reasonable career ladders and opportunities at all levels are extended to peer providers.

It is likely that a subset of people taking on new peer provider roles will not adjust well to their roles at first. Some may need the kind of additional training or mentoring you could apply for any employee. Some many need employee supports that are more disability-oriented, such as intensive job coaching, job modification, or assistive technology. Some may need to develop the competence and confidence needed on the road for a highly mobile position, or additional education and training.

It is possible that a small subset of new peer providers may not be able to adjust to the position, and may need to be replaced. Prior to firing the person, it is essential to ensure that all ordinary personnel policies are followed, and that the person has been given adequate information, opportunity, and support to succeed in the job. It is advisable to proceed with a termination in a way that leaves the door open for future re-application, should the person's future capabilities and interests suggest it is time to try again. Whenever possible, explore other position vacancies in your organization that might be a better match for their skills and aptitudes. In addition, it is essential to conduct a thorough assessment of the work environment and team performance to ensure that any performance issues are not the result of poor treatment and stigma from colleagues.

Some agencies are likely to use their wellness coaches and other peer providers in part-time roles. This may suit some employees, while others may not be satisfied with limited hours and limited compensation. Ideally, the amount of work for peer wellness coaches will expand at the same rate as people are ready to expand their hours. While it is not the supervisor's role to deal with any benefits issues that may contribute to a person's unwillingness to work full-time, it is certainly acceptable to suggest benefits counseling.

In dealing with the challenges of helping a wellness coach integrate and grow, it may be useful for the supervisor to focus on the multiple benefits of doing so:

- As part of a wellness and recovery transformation, we need more peer providers throughout the mental health system,
- Service recipients and their family members benefit from seeing the successful activities of peer providers,
- Agencies need competent and compassionate workers, and
- The individual who has joined your team wants and needs the job for financial and non-financial reasons.

Making a *Wellness Coaching Program* work requires the support of everybody involved, including:

- People served, who need to value the desired outcomes (health improvement), and are willing to take the time to work with the wellness coach towards those outcomes,
- Professional and family/community supporters of the people you serve, who can obviously help increase or decrease acceptance by the person served,
- Other members of your team, who will play a key role both in creating referrals to the wellness coach, and in providing him or her with practical support,
- Your upper management and personnel department, who will help create the climate and secure the resources, and
- You, the supervisor, will be the person to keep all of this going.

Clear communication may be an important part of sustaining or building increased use of a wellness coaching activity. It is entirely possible that people in all of the roles above have limited or no knowledge of the:

- impact health and wellness factors are having on the lives and lifespan of people living with mental illness,
- extent to which these factors can be addressed, in part, through lifestyle changes,
- role of coaching in helping people with or without a mental illness make lifestyle changes, and
- increased prevalence of peer providers throughout the mental health system.

You may find yourself conveying this information through a variety of means, such as staff trainings, articles in newsletters, or short talks at various get-togethers. Your wellness coach should be helped to take on many of these activities in marketing wellness coaching.

Whether at your level and/or an organizational level, changes in **processes** can play an important part.

- Are health assessments a part of all intakes?
- Should the results of some health assessments result in referral to your wellness coach (or should you wellness coach be doing those assessments as part of every intake?)
- Are the services of the wellness coach considered a first-line choice for helping an existing client deal with a lifestyle-related health or other wellness issue?
- Do your wellness coaches speak regularly to your treatment groups, alumni groups, family groups, etc.?
- Does new employee orientation include information about the services of the wellness coach?
- Are wellness coaches recognized as an asset to aid not only the people you serve, but members of your workforce experiencing health or other wellness issues which could benefit from lifestyle change

## Appendix A- Sample Key Functions and Tasks

*Title: Wellness Coach*

### *Key Functions and Responsibilities (Key Tasks)*

- Assist peers in choosing, obtaining and keeping wellness and healthy lifestyle related goals.
- Help a peer work through the process of identifying health and wellness related goals.
- Ask facilitative questions to help peers gain insight into their own personal situations.
- Empower peers to find solutions for health problems and concerns they are facing.
- Help peers to find their own solutions by asking questions that give them insight into their wellness status.
- Assist in identifying steps to take to achieve a health and wellness related goal.
- Assist peers in strengthening their readiness to actively pursue health wellness.
- Use a variety of methods, tailored to the individual, to move through the process of setting and reaching health and wellness related goals.
- Provide structure and support to promote personal progress and accountability.
- Compile and share wellness and healthy lifestyle resources for peers and other staff or supporters.
- Selectively use self disclosure to *inspire and support*.

## Appendix B- Wellness Coach Ethics

The following are ethical standards we have established for peer wellness coaches. Coaches should understand and adhere to these standards, and supervisors should regularly review them with peer wellness coaches under their supervision.

- Establish and maintain a *mutually empowered relationship* that serves the person's needs and preferences.
- Do not do any harm, physically or psychologically.
- Support the recovery process for the person served, allowing them to direct their own process.
- Do not force your own beliefs or values onto others.
- Maintain Confidentiality.
- Commit to continually develop and refine *skills and competencies*.

## Appendix C- Elements of a Good Job Description

### Elements of a Good Job Description

A job description provides a summary of the primary duties, responsibilities, and qualifications of a position. It is important to reflect priorities and current expectations.

#### Components of the job description:

##### *Function:*

Summarize the main purpose of the position within the department/organization in one sentence.

##### *Reporting Relationships*

Describe the “chain of command” and the types of supervision the employee will get and will give, indicating the specific job titles of the supervisors and the positions supervised.

##### *Responsibilities*

List 4 to 6 core responsibilities of the position and identify several specific duties within each of the core responsibility areas.

##### *Qualifications/Competencies*

List required and preferred qualifications, credentials, and competencies in order of importance. These might include educational requirements (e.g., a high school diploma or equivalency), training or certification as a peer specialist, or specify that the employee must be a person in recovery (e.g. “Be a self-identified current or former user of mental health or co-occurring services who can relate to others who are now using those services” or “Must be a self-disclosed individual with a mental illness)

##### *Employment Conditions*

Describe any relevant circumstances, such as any physical requirements (e.g., standing, lifting), environmental conditions, unusual work schedule (e.g., rotating shift, on-call hours), and any other requirements (e.g., driver’s license, background check, random drug screen).

##### *Tips from the Small Business Association (<http://www.sba.gov>):*

- A good job description begins with a careful analysis of the important facts about a job, such as tasks involved, methods used to complete the tasks, and the relationship of the job to other jobs.
- It’s important to make a job description practical by keeping it dynamic, functional, and current.
- Don’t get stuck with an inflexible job description! A poor job description will keep you and your employees from trying anything new and learning how to perform their job more productively. A well-written, practical job description will help you avoid hearing a refusal to carry out a relevant assignment because “it isn’t in my job description.”

[http://www.sba.gov/smallbusinessplanner/manage/manageemployees/SERV\\_JOBDESC.html](http://www.sba.gov/smallbusinessplanner/manage/manageemployees/SERV_JOBDESC.html)

Wellness Assessment	<u>Strengths</u> Describe Your Personal Strengths in each Dimension	<u>Needs</u> Describe What You Want To Change/Improve	<u>Barriers</u> <i>What Could/Does Get In Your Way?</i>
Domain			
Overall Physical Health			
Nutrition			
Physical Activity			
Sleep/Rest			
Relaxation/Stress Management			
Environment			
<i>Medical Care/ Screenings</i>			

**Appendix D- Wellness Planning Tool**

DIMENSION	Dissatisfied			Satisfied				Focus
	Very	Satisfied						
Overall Physical Health	1	2	3	4	5	6	7	
Nutrition	1	2	3	4	5	6	7	
Physical Activity	1	2	3	4	5	6	7	
Sleep/Rest	1	2	3	4	5	6	7	
Relaxation/Stress Management	1	2	3	4	5	6	7	
Environnent	1	2	3	4	5	6	7	
Medical Care/Screenings	1	2	3	4	5	6	7	

Review the following areas (left column) and circle level of satisfaction in each Dimension.  
 In the Focus column indicate one area with a star \* that you want to **improve or change**.

## Appendix E

### CORE WELLNESS COACHING SKILLS & TECHNIQUES

#### Wellness

- Define Wellness
- Identify the 8 Wellness Dimensions
- Ask About Physical Wellness (e.g., Physical Activity, Nutrition, Smoking)
- Explore Substituting Healthy for Unhealthy Behaviors
- Offer Support for Healthy Behaviors
- Develop Quit Smoking Plan
- Use of Health Support Plan
- Use of Health Care Journal
- Address Fear of Doctors, Appointments, Procedures, etc.

#### Communication Techniques

- Active Listening
- Preparing to Attend
- Physically Attending
- Responding to Content
- Responding to Feeling
- Responding to Meaning
- Using Facilitative Questions
- Identifying Blocks to Listening
- Refocusing

#### Wellness Planning

- Explore Personal Values

- Setting an overall wellness goal
- Identifying Critical Skills
- Developing Objectives & Interventions
- Designing Methods of Evaluating Progress

#### Coaching

- Help the person to clarify the need for change or improvement
- Determine if there is a clear goal
- Brainstorm actions to be taken
- Determine the action
- Set an accountability step
- Set a time frame

#### Motivational Interviewing

- Decision Balance (Pros and Cons List)
- Ask Change Talk Questions

#### Personal Narrative & Disclosure

- Share a Personal Wellness Narrative

#### Empowerment & Advocacy

- Planning to Meet with Other Health Care Providers
- Identifying Questions to Ask Provider