



HOLISTIC COACH TRAINING INSTITUTE

Holistic Coach Certification Program
Outline & Agreement

(Please read this document in its entirety and let me know if you have any questions)

Welcome to this amazing experience where you will be learning and becoming your best coaching Self. You have taken a step forward to turn your dream of more time, money and creative freedom into a reality. Now it's time to grow your coaching skill set. Your development requires tremendous intention, accountability and determination. And **I am here to partner up with you**, and make it happen.

We are in this together! You are an important part of the group. Always remember that you are adding your essence, whether you are showing up or not. This truly is a collective energy of people who intend to make a meaningful impact in the world. As your Coach, I'm here to support the highest good for all! All I ask is that you show up as powerfully as you can, try on the new info you are receiving and share your learnings with us. **This program is focused on learning the ICF Core Competencies, Ethics and Standards alongside a holistic approach to coaching.**

In order to create safety for yourself and others, [check out the Standards of Presence](#).

This goes without saying, but the people who show up consistently, implement what they are learning and share their experience are the people that do the best and receive the most value. Remember that you create value for yourself.

I'm the guide and you are the hero.

I can't wait to see what we create together.

Bev 🙏💜

WEEKLY REQUIREMENTS:

1. **Access module materials** through the learning portal. Look over all materials. Come to our live sessions with questions or comments about each lesson. I love to be interactive with you, and we all learn from one another. Please know your questions and thoughts are welcomed. Content is dripped out weekly. Learning Portal Login: <https://members.holisticcoachtraininginstitute.com>. Should you have a problem with log-in, contact: requests@smd.help.com. Login and password are provided to you within days of signing up for the program. Check Spam Folders if you haven't received it before reaching out to the support team. All content is also posted in the LinkedIn group for your convenience.
2. **Practice skills, templates or coaching outline** with your coaching partner for a total of 1 hour each week. You coach them for 30 minutes and they coach you for 30 minutes. Please respect people's time and schedule sessions when convenient to both parties. I've provided you a tracking sheet so that you can start to accumulate hours. You will need to log 12 hours of you coaching someone else by the end of the program. You will be paired with someone in the class but can coach with other people, if you like. Best practices are to respect confidentiality, be dependable and be coachable.
3. **Attend live sessions.** When attending live, be sure to be present and available to coach, share and interact. My preference is that you are on camera. Class recordings will be posted within 48 hours in the LinkedIn group for 14 days and will then be taken down. These recordings are confidential and are not meant to be downloaded or shared with other people. If you do miss a class, watch the replay and share your learnings in our LinkedIn group.
4. **Post in the LinkedIn Group.** Posting in the online group is optional, but highly recommended as it gives you another place to be accountable and supported. Best use would be to share your biggest take-aways or learnings from each lesson so that you can ground and deepen your awareness as we move through all the Modules. Post as much as you want, this is your space to connect, to share, to celebrate together! Make sure feedback is positive, supportive and coaching in nature. This is a great place to practice your coaching skills by asking each other powerful questions.

This program is about helping you learn the basic ICF Core Competencies, Ethics and Standards of coaching while learning a holistic approach to coaching.

Program Contact Info:

Email - info@holisticcoachtraininginstitute.com

Website - www.holisticcoachtraininginstitute.com

Phone - (904) 469-6009

Title of the program:

Holistic Coach Certification Program

General program vision and goals:

Empowering professionals to become credentialed Coaches using the ICF Core Competencies, Ethics and Standards. The goal of the program is to set you up to become a credentialed Coach through the ICF while learning and applying a holistic approach to your coaching.

List of Classes/Modules:

Before We Begin:

Program Outline & Agreement

Coaching Partner Tracking Sheet

Module 1: Coaching Definition & Holistic Coach Philosophy

Providing ICF definition of coaching and exploring the benefits of holistic coaching

2.5 hours class time

All Core Competencies

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 2: ICF Core Competency Model & 8 Core Competencies

Providing Core Competency Model, 8 Core Competencies and Session Outline

2.5 hours class time

All Core Competencies

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 3: Discovery Call & ICF Ethics

Acknowledging what ethically needs to be addressed during Discovery Call

2.5 hours class time

Core Competency #1, Core Competency #2, Core Competency #3

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 4: Coach-ability

How to make sure a Client is Coach-able

2.5 hours class time

Core Competency #1, Core Competency #2, Core Competency #3

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 5: Effective Partnership and Coaching Mindset

How to create an effective partnership during the Initial Session with a Client

2.5 hours class time

Core Competency #1, Core Competency #2, Core Competency #3 and Core Competency #4

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 6: Check-in on Progress

How to check progress at the beginning of a coaching session

2.5 hours class time

Core Competency #2, Core Competency #3, Core Competency #7 & Core Competency #8

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 7: Clarifying the Agreement

Clarifying the coach agreement and measure of success

2.5 hours class time

Core Competency #3, Core Competency #4, Core Competency #5 & Core Competency #6

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 8: Cultivating Trust & Safety

How to develop trust and safety in the coaching partnership

2.5 hours class time

Core Competency #4, Core Competency #5 & Core Competency #6

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 9: Maintains Presence

How to prepare for a coaching call for ultimate presence

2.5 hours class time

Core Competency #2, Core Competency #5 & Core Competency #6

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 10: Listens Actively

How to develop Active Listening

2.5 hours class time

Core Competency #4, Core Competency #5 & Core Competency #6

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 11: Powerful Questions

How to ask questions that evoke discovery, insights or challenge perspective

2.5 hours class time

Core Competency #5, Core Competency #6, Core Competency #7 & Core Competency 8

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 12: Direct Communication

How to provide direct communication around your active listening, intuition and metaphors

2.5 hours class time

Core Competency #4, Core Competency #5, Core Competency #6, Core Competency #7 & Core Competency #8

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 13: Re-contracting Agreement

How to re-contract when Client changes agreement

2.5 hours class time

Core Competency #3, Core Competency #6 & Core Competency #7

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 14: Evoking Awareness

How to increase awareness through acknowledgment and strength-based coaching

2.5 hours class time

Core Competency #6 & Core Competency #7

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 15: Facilitates Client Growth

How to help Client turn insight into action

2.5 hours class time

Core Competency #4, Core Competency #7 & Core Competency #8

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 16: Designing Actions

How to design action steps within the coaching partnership

2.5 hours class time

Core Competency #8

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 17: Planning and Goal Setting

How to create an effective plan around action steps

2.5 hours class time

Core Competency #8

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 18: Managing Accountability

How to explore accountability within the coaching partnership

2.5 hours class time

Core Competency #8

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 19: In Between Sessions

How to determine accountability in between sessions

2.5 hours class time

Core Competency #4 & Core Competency #8

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 20: Managing Progress

How to check progress halfway through and wrap-up a coaching container

2.5 hours class time

Core Competency #3 & Core Competency #8

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 21: ICF Mentorship Hours

How to increase your skill set through coach mentorship hours

2.5 hours class time

All Core Competencies

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 22: ICF Level 1 Application Process

ICF ACC requirements, process and test

2.5 hours class time

All Core Competencies

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 23: Level 1 Performance Evaluation

How to align Client onboarding with ICF Core Competencies

2.5 hours class time

Core Competency #1, Core Competency #2, Core Competency #3 & Core Competency #4

Delivered through training videos, handouts, coaching partner and in class demonstration

Module 24: Graduation & Next Steps

Closing process and next steps: mentoring, business set-up and continued coach education

2.5 hours class time

All Core Competencies

Delivered through training videos, handouts, coaching partner and in class demonstration

Number of student contact hours included in the program:

24 Modules x 2.5 hours = 60 hours (Synchronous)

12 hours of materials on learning portal = 12 hours (Asynchronous)

For total of 72 hours of coach education

Plus 10 additional hours of mentorship coaching and performance evaluation that needs to be completed within 6 months of program end date or additional fees may apply.

Learning Goals:

Learn the ICF Core Competencies, Ethics and Standards so that you can:

- Increase your competency of the coaching process
- Increase confidence in your coaching skills
- Increase coaching effectiveness through the application of the ICF Core Competencies, Ethics and Standards to your coaching practice
- Add a holistic approach to the coaching conversations

Coaching Philosophy:

Holistic Coaching empowers "the whole person" to reach their full potential in all areas of their life encompassing the mental, emotional, physical, and spiritual levels. This philosophy applies to the Coach and Coachee.

List of Lead Instructors:

Lead Instructor: Beverly Sartain, PCC

Sub Instructor: Richard Sartain, ACC

Mentor Coach and Sub Instructor: Gage Bock, PCC

And any other current Sub Instructor assisting the Institute at time of cohort

Learning Philosophy:

We use a 3-pronged approach to learning that includes asynchronous and synchronous learning.

There are 3-steps implemented each week throughout the 6 month program to support you in learning and developing your coaching skill set.

- Step 1: Each week there is a video lesson delivered via The Holistic Coach Training Institute Learning Portal. Each video lesson includes a printable worksheet to assist you with taking notes and brainstorming how you will apply the lesson to your own coaching. The learning portal is available 24/7 so the lessons can be viewed at your Convenience. Each Module takes about 30 minutes to review.
- Step 2: Each week you will collaborate with a partner from the cohort to put the skills that you learned from the lesson into practice. You will meet with your partner over phone or video for one hour each week based on your individual schedules. Each partner practices being in the role of coach for 30 minutes then in the role of client for 30 minutes. You are encouraged to work with more than 1 person from the cohort, as well as work with people outside of the cohort.
- Step 3: Each week we meet via ZOOM for a live 2.5 hour training where we review the weekly lesson, engage in a group discussion, answer questions, and listen to recorded coaching practice calls with live feedback. Listening to peers practice coaching and receive constructive feedback will support you in having new awareness and developing your own coaching skills.

Engaging the weekly video lessons with worksheets, coaching with a practice

partner, and receiving live coach training is a comprehensive approach to learning and developing your coaching skills that will prepare you for greater long-term success with your coaching. There is also a private LinkedIn group created for each cohort where students can interact, network, share, receive course content, and get updates as a way to build community. LinkedIn groups are shut down 6 months after the cohorts are complete.

Languages that the program is delivered in:

English

Intended participants:

Professionals who wish to become credentialed coaches via the ICF using the ICF core competencies, ethics and standards. These professionals intend to use coaching as an additional skill to their current work or as the basis for their business or organization.

Requirements that the student must agree to in order to enter the program:

- Have 4-5 hours to devote to this training every week.
- Attend live sessions. You can miss no more than 4 live sessions (unless otherwise discussed with the facilitator.)
- Turn in a copy of your Coach Partner Tracking Sheet (or another form of documentation) at the end of the program to verify 12 hours of coaching.
- Per the ICF, the program has to provide 5 observed coaching sessions to each student. Therefore, you will need to turn in at least 3 audio recordings for us to observe during class and participate in in-class exercises.
- Work with a practice partner from our group or outside of the group so that you try on the coaching skills you are learning for an experiential experience.
- Be open to receiving feedback on your coaching skills from the instructor.

Requirements for completion of the program:

- Attend 20 out of 24 live class sessions (I keep attendance)
- Turn in at least 3 recordings (recording depend on class size) and participate in class exercises (Due dates provided during program and posted in the LinkedIn group)
- Complete Test (Module 22)

- Turn in coaching log verifying that you coached someone else for 12 hours (By Module 24)

Once these requirements are met, students are provided a certificate at the end of the program verifying that they completed the coach education hours and certifying you as a Holistic Coach from the Holistic Coach Training Institute. To receive the full Level 1 certificate for your ICF credential, you must complete 10 hours mentorship and pass the Level 1 Performance Evaluation.

Policies on payment of tuition:

There is a pay in full option that provides a discount to students. And there are payment plan options for those who want to pay monthly. The standard cost of the Holistic Coach Certification Program is \$4,550 available with a 13 month payment plan of \$350 per month or \$3,850 if paid in full. There are no additional fees or interest added to the payment plans. We use Stripe as our invoicing system. Payments are automatically debited each month. If you do not pay within 21 days and have not made arrangements with us around how payment will be made, your access to materials will be discontinued and you will be taken out of the group. Please know you can discuss your needs with us.

Refund Policy:

Full refunds are issued if a notice to cancel is received within 3 days after initial payment is made. There are no refunds after 3 days from the time of initial payment. In order to qualify for a refund within the 3 day period, an email must be sent to info@holisticcoachtraininginstitute.com requesting cancellation. After the 3 day period, cancellations and withdrawals qualify for an "in house credit" that can be applied to future programs or individual coaching. If there is something that comes up and you are no longer able to continue in this cohort, we can discuss you attending another cohort. We are happy to work with you on ensuring you receive the value of your investment. And if you are not getting what you need from the program (for any reason), give us the courtesy of a conversation so we can work through it together. If you are needing different support, let's discuss your needs and course-correct, if needed. A student can leave the program at any time. If the student leaves the program, they will still be responsible to pay for services rendered.

Unforeseen Circumstances Policy:

In the event of a temporary power outage or internet service disruption during a live session, the Instructor will attempt to re-enter the live session as soon as possible. In the event that more than 10 minutes passes without the Instructor present, the class will be considered canceled and students should exit the session and attend the next regularly scheduled live session.

In the event of unforeseen circumstances including, but not limited to: natural disasters, acts of God, service disruptions, war, terrorism, state, national, and international emergencies, etc, where training is unable to be delivered or attended according to plan/schedule, students/customers will receive an "in house credit" for the total amount paid to date and will be given the option to select a future training cohort as available. Agreed payments will continue. No refunds are available after 3 days from initial payment in accordance with the refund policy.

Organizations Illness Policy:

Students who are absent from class or any required class-related activity because of illness should contact their instructor, if feasible, as early as possible prior to the missed class. Students and instructors can work together to see if materials can be made up in a reasonable time. If a student is going to miss more than 4 of the live-online sessions due to the illness, an alternative option for completion of the program will be provided. Holistic Coach Training Institute allows students who need to drop out of a cohort due to illness to participate in another cohort within 12 months of the initial cohort's start date without additional fees. Future payments can be halted, but no money is refunded for an illness.

Confidentiality:

If you share a recording in class then you need to have permission from the Coachee to share it. Anything shared in the live sessions will be kept confidential unless permission is provided. We may ask if we can use your recording for ICF accreditation purposes. The ICF requires programs to provide student recordings as an example of work being completed in the program. We will ask your permission if we would like to use your recording. We will be housing our group calls for 2 weeks in our LinkedIn group so that people who may have missed class have an opportunity to view it. Then those recordings will be discarded.

If there is something you are curious about that is not included in this outline and agreement, feel free to ask. Remember that we are in a partnership together. Please communicate with us what's going on for you. We don't know what you don't communicate so make sure to let us know what you need so we can work together to resolve your needs and make this the best experience possible.

Here's to an incredible journey!