

# Practical Skills Assessment: Categories/Competencies, Skills and Evaluation Checklist Health and Wellness Coaching Certification(s) MentorCoach, LLC

## OVERVIEW AND EXPECTATION(s) for PRACTICAL SKILLS ASSESSMENT (PSA)

### Practical Skills Assessment (PSA) Expectation(s) for National Board Credentialing for Health and Wellness Certification (NBHWC)

The MentorCoach Process for the Practical Skills Assessment is to schedule one Mentoring Session in which a NBHWC Faculty Member will review the expectations of the Practical Skills Assessment Process. The Practice Skills Guidelines will be reviewed with the NBHWC faculty member, answering student questions and ensuring preparation for the evaluation of the Health/Wellness related recordings (according to NBHWC guidelines) are understood. (This explanation and review is one of the four hours required by MentorCoach for the PSA.

Next, the student will identify health and wellness coaching client(s) and set up sessions that are a MINIMUM of 20 minutes in length. Sessions can be longer if that is the need of client and student. In order to complete the MentorCoach Health and Wellness Coaching requirements and be eligible to sit for the national examination, three complete sessions must be evaluation by a NBHWC faculty member.

#### Practical Skills Development:

- This process is completed using recordings that the student prepares in advance, then both faculty and student listen to the recording together. (it is possible, if the student conducts the coaching session on Zoom, that the faculty member and student will listen to the recording together.
- These Practice Sessions are followed by faculty-led feedback on practical coaching skills consistent with NBCHWC Requirements.
- The Feedback will be provided verbally, in real-time. A minimum of one hour of total feedback time (with the recording is provided for the student for the three sessions and this counts as the required hours described in the course requirement(s).
- The PSA Coaching Demonstrations sessions are evaluated and are assessed for competency in practice skills and the faculty assessment results in a pass/fail grade. For MentorCoach the passing grade is 80%. Each skill is graded with an “S” for Satisfactory or and “ND” which means needs development. A separate evaluation is done for each session, the student will receive verbal feedback re: the critical areas to highlight in future (final two) recorded coaching sessions. This is to ensure that the student demonstrates SUCCESSFULLY at least an 80% passing score (with the three recorded coaching sessions. If the 80% is not achieved, then additional coaching recordings will be required until the student is able to pass the PSA with an 80% Passing Score.
- Feedback summary will be provided in writing as described on page # 8, below. Please do not hesitate to seek clarification as needed.

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Category – Competency	Practical Coaching Skills	1st Session Score	2nd Session Score	3rd Session Score	Total Satisfactory Score
<b>Coaching Mindset*</b>	<b>1. Develops an ongoing reflective practice to enhance one’s coaching</b>				
	<b>2. Remains aware of and open to the influence of context and culture on self and others (in preparation for the coaching).</b>				
	<b>3. Uses awareness of self and one’s intuition to benefit clients.</b>				
	<b>4. Develops and maintains the ability to regulate one’s emotions</b>				
	<b>5. Mentally and emotionally prepares for client sessions</b>				
<b>Clarification of Coaching Versus Other Strategies*</b>	<b>1. Explains what coaching is and is not and describes the process to the client and relevant stakeholders.</b>				
	<b>2. Reaches agreement about what is and is not appropriate in the relationship, what is and is not being offered, and the responsibilities of the client and relevant stakeholders.</b>				
	<b>3. Reaches agreement re: guidelines/parameters of coaching including fees, scheduling, confidentiality and potential inclusion of others.</b>				
<b>Client’s Agenda and Focus for Session(s)*</b>	<b>1. Partners with client (and relevant stakeholders) to establish an overall coaching plan and goals.</b>				
	<b>2. Partners with the client to identify what they want to accomplish in the session.</b>				
	<b>3. Partners with client to define what the client believes they need to address/resolve to achieve what they want to accomplish in the session.</b>				
	<b>4. Partners with the client to define or reconfirm measures of success related to what the client wants to accomplish in the engagement/ session.</b>				
	<b>5. Partners with the client to manage the time and focus of the session.</b>				
	<b>6. Continues coaching in the direction of the client’s desired outcome unless the client indicates otherwise.</b>				
	<b>7. Partners with client to end the session in a way that honors the experience</b>				

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<b>Building Trust, Safety and Showing Empathy *</b>	1. Seeks to understand the client within their context which may include identify, environment, experiences, values and beliefs				
	2. Acknowledges and respects the client's unique talents, insights, and work in the coaching process.				
	3. Shows support, empathy, and concern for client.				
	4. Acknowledges and supports the client's expression of feelings, perceptions, concerns, beliefs and suggestions.				
	5. Demonstrates openness and transparency as a way of displaying vulnerability and build trust with the client.				
	6. Remains Focused, observant, empathetic and responsive to the client.				
<b>Coaching Presence *</b>	1. Manages one's emotions to stay present with the client.				
	2. Creates or allows space for silence, pause or reflection				
	3. Is comfortable working in a space of not knowing.				
	4. Demonstrates curiosity during the coaching process.				
	5. Is comfortable working in a space of not knowing.				
<b>Visioning of Health and Well-Being</b>	1. Explore with client a vision of one's best self, related to health/wellness.				
	2. Explore VIA Strengths and how these contribute to the vision of health, wellbeing and wellness.				
	3. Explore that use of mindfulness, self-compassion, and motivation to make a change in health, wellness and wellbeing.				
	4. Challenge the client to describe what they want and believe they can do and be in the longer term with a focus on health-behavior change.				
	5. Explore values, outcomes and strengths that can assist the client to achieve longer-term vision related to how the person wants to BE in the future.				
	6. Identify some of the support systems that are needed to achieve the vision.				

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<b>Health Wellness Goals (Using SMART Goals)</b>	<b>1. Identifies the importance of using the SMART Goal framework with the client to achieve the vision for Health, Wellness and Well-Being</b>				
	<b>2. Explores with the client shorter term goals and action steps that assist the client to create SMART goals</b>				
	<b>3. Partners with the client to create SMART goals relevant to health-behavior change(s) that the client has identified consistent with the Vision.</b>				
	<b>4. Invites the client to explore and experiment with <u>Specifics</u>, the <u>Actions</u> needed to achieve the goal. How to <u>Measure</u> progress.</b>				
	<b>5. Explores with the client opportunities and challenges to identify a <u>Realistic Timeline</u> and how best to manage accountability for the Actions</b>				
	<b>6. Partners with the client to explore lessons learned from past goal setting related to health and wellness change.</b>				
	<b>7. Explores SMART Goals with an Experimental Mindset depending on the assessment of the Stage of Change the client is in.</b>				
<b>Active (Deep) Listening *</b>	<b>1.Explores the client’s beliefs, values, and intentions for change.</b>				
	<b>2.Recognizes/inquires when there is more to what the client is communicating.</b>				
	<b>3.Notices, acknowledges and explore the client’s emotions, energy shifts, non-verbal cues or other behavior(s)</b>				
	<b>4.Integrates the client’s words, tone of voice and body language to determine the full meaning of what the client is communicating.</b>				
	<b>5.Notices trends in the client’s behaviors and emotions across sessions to discern themes and patterns.</b>				
	<b>6. Reflects or summarizes what the client is communicating to ensure clarity.</b>				
	<b>7. Coach inquiries about the client’s use of language and what they believe regarding health and wellness.</b>				

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Powerful Questions *	1.Asks questions about the client, such as their way of thinking, values, needs, wants and beliefs.				
	2.Asks questions that help the client explore beyond current thinking.				
	3.Invites the client to share ore about their experience in the moment.				
	4. Asks ‘what’ and ‘how’ questions focusing on open-ended exploration.				
	5.Notices what is working to enhance client progress.				
	6. Adjusts the coaching approach and powerful questions in response to the client’s needs				
Client Strengths (Using VIA Positive Psychology)	1.Explores with client values and strengths related to meaning and purpose (utilizing VIA Strengths Assessment).				
	2. Inquires about the relationship of values and strengths related to the SMART goals and what would help achieve stated goal-outcomes.				
	3. Explore with curiosity how specific strengths might contribute to resistance or challenges in achieving goals.				
Use of Motivational Interviewing to Assess Readiness, Confidence and Willingness (Application of Prochaska, Bandura and Self-Determination Theory)	1. Invites client to explore readiness for health-behavior change using the ‘Readiness for Change’ scale to help understand Prochaska’s for change.				
	2. Explores with the client some of the challenges and obstacles that could impact the change process and timing.				
	3. Invites the client to use the ‘Willingness scale to assist in determining whether or not the client is personally committed to making the change or if it is someone else’s idea/expectation (Self-Determination Theory).				
	4. Invites the client to explore their confidence level for achieving the planned change using the ‘Confidence Scale’ based on Bandura’s theory.				
	5.Brainstorms potential solutions based on results of these ‘Assessment Scales’ as appropriate.				

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<b>Explore Broader Perspective, Self-Discovery and Insight (Framed through use of chosen Approaches such as:</b> 1. Immunity to Change 2. Appreciative Inquiry 3. Travis Model 4. WOOP/Other	<b>1. Provides opportunities for self-discovery of potential change strategies depending on one or more of model(s) for health-behavior change.</b>				
	<b>2. Explores potential ambivalence and competing commitments to making the health-behavior change as identified in the SMART goal discussion</b>				
	<b>3. Explores internal obstacles that may need to be addressed in order to be successful in making the health-behavior change.</b>				
	<b>4. Explore potential underlying values, motivations, beliefs that could have either a positive or negative impact on the plan for health-behavior change(s).</b>				
	<b>5. Assist the client to focus on what ‘would/could work’ versus the obstacles in exploring internal challenges to achieve health-wellness changes.</b>				
	<b>6. Partners with the client to co-create a plan to navigate challenges and opportunities as models for health/wellness change are explored.</b>				
<b>Coaching Strategies for Sharing Health and Wellness Information</b>	<b>1. Explores what the client knows re: information/research regarding their particularly health and wellness challenge and/or goals.</b>				
	<b>2. Challenge the client to first explore resources based on accepted websites and/or other information consistent with NBHWC content.</b>				
	<b>3. Asks permission to share information and/or possible recommendations based on accepted guidelines/resources.</b>				
	<b>4. Stays within the NBHWC Scope of Practice when Information sharing related to the client’s challenges and/or goals.</b>				
	<b>5. Offers curious inquiry regarding information shared by the coach to determine whether there are beliefs, concerns and/or challenges related to Social Determinants of Health and/or belief systems.</b>				

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<b>Evoking Awareness and Insight *</b>	1. Challenges the client as a way to evoke awareness or insight.				
	2.Asks questions to help the client explore beyond current thinking.				
	3.Invites the client to share what they learned about their situation and goals from the coaching session.				
	4. Invites the client to share what they learned about themselves, such as way of thinking, values, needs, wants and beliefs.				
	5.Notices what is working to enhance client progress.				
	6. Helps identify factors that influence current and future patterns of behavior, thinking or emotion.				
	7. Invites the client to generate ideas about how they can move forward and what they are willing to try (or be able) to do.				
	8. Supports the client in reframing perspectives and insights.				
	9.Coach shares observations, and insights without attachment that have the potential to create new learning for the client.				
<b>Accountability and Tracking Methods for Self-Monitoring *</b>	1. Partners with the client to design actions and accountability measures that integrate and expand new learning/awareness.				
	2. Explores with the client how they would like to be accountable for the actions/goals/approaches they plan to implement.				
	3. Discuss with client how they would like to track (self-monitor) the health behavior changes between now and the next session.				
	4.Explore with client the support needed from others and/or the coach.				
	5.Supports the client in identifying potential results or learning from identified action steps.				
	6.Partners with the client to celebrate progress and success in coaching.				
	7. Partners with the client to close the session.				

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		TOTAL POINTS	TOTAL POINTS	TOTAL POINTS	TOTAL Percentage
	<b>INSTRUCTOR COMMENTS/FEEDBACK</b> Satisfactory (S) Points & Needs Development (ND) Points	Points 1 <sup>st</sup> Session	Points 2 <sup>nd</sup> Session	Points 3 <sup>rd</sup> Session	Percentage and Goals
Instructor Feedback – 1 <sup>st</sup> Session					
Instructor Feedback – 2 <sup>nd</sup> Session					
Instructor Feedback – 3 <sup>rd</sup> Session					