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Health Coaching Case Report: Optimizing Employee Health and Wellbeing in Organizations

Shannon Yocum M.A., NBC-HWC

University of Minnesota, Earl E. Bakken Center for Spirituality and Healing, yocum016@umn.edu

Karen Lawson MD, ABIHM, NBC-HWC

University of Minnesota, Earl E. Bakken Center for Spirituality and Healing, lawsonk@umn.edu

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SHANNON YOCUM
MINNEAPOLIS-ST. PAUL,
MN, USA

KAREN LAWSON
MINNEAPOLIS-ST. PAUL,
MN, USA



Health Coaching Case Report: **Optimizing Employee Health and Wellbeing in Organizations**

Abstract

Health and wellbeing of employees has a direct correlation to organizational performance. It is essential that organizations and successful leaders prioritize the health and wellbeing of all employees – from the C-suite to entry level positions. As rates of stress, chronic illness, and unhealthy lifestyle choices continue to increase, it is imperative that organizations discover strategies that cultivate employee wellbeing. Employees with high wellbeing are more engaged, productive, and energized and directly affect a company's bottom line; it is in the best interest of employers to invest in human capital and wellbeing of employees. Health and wellness coaching demonstrates encouraging potential as a catalyst to optimize employee wellbeing. Rooted in science-based research with the foundation in relationships, communication, and connection, health coaches partner with employees as they build self-awareness around a holistic view of health. As employees increase self-awareness, they recognize the importance of managing stress and self-care, connect to their vision and values, take active steps towards change, and address barriers and obstacles. With these strategies, individuals build resilience as they gain energy, empowerment, and work towards positive growth. This paper outlines the challenges that leaders and employees are facing, describes health and wellness coaching, and provides a group coaching case study example that demonstrates how health and wellness coaching can foster employee wellbeing. This case study is important as it supports evidence that health coaching shows promise as a strategy to optimize employee health and wellbeing.

Introduction

Our lives have been drastically altered over the last two decades. The rapid speed and advancement of technology has changed the nature of work. Work demands have encroached upon personal time resulting in the challenge to maintain a work-life balance. Lifestyle choices

are becoming increasingly difficult to manage. Additionally, the political landscape and world events have conditioned us to live in a hypervigilant state. All of this is creating a cultural and societal shift, the likes of which has not been witnessed before and it is deeply affecting the health and wellbeing of employees as well as the holistic bottom line of organizations.

Alarming statistics are making headlines. Life expectancy for Americans has dropped for the third consecutive year in a row, a dismal trend (Murphy, Xu, Kochanek, & Arias, 2018). According to a recent Gallup poll, Americans are among the most stressed-out people in the world. About 55% of adults experienced stress “a lot of the day” prior, compared to 35% of citizens globally (Ray, 2019). According to Dr. Anderson, CEO of the American Psychological Association, 75% of healthcare costs are related to chronic illness – and the key driver is stress (Martin, 2012). Unhealthy and stressed employees are estimated to cost businesses up to \$300 billion a year (American Institute of Stress, 2014).

As a society, we are in desperate need for innovation and transformation. According to the American Medical Association President, Dr. Barbara McAneny, “The trend of declining life expectancy in the United States is deeply concerning and demands an all-hands-on-deck approach to reverse course” (McAneny, 2018). Health and wellness is not an isolated healthcare issue - it deeply affects all aspects of our lives, especially the workplace. Jim Purcell, former CEO of Blue Cross and Blue Shield of Rhode Island, states, “Employee wellness is very much management’s business... It is clear that the workplace is the optimal opportunity for employee wellness efforts” (Purcell, 2016).

Forward-thinking, successful leaders and organizations understand that it is essential to support employee health and wellbeing to maintain an engaged, productive workforce to enhance business performance. Additionally, strong, effective leaders address and model their own wellbeing while taking an active role in supporting employees as they manage the ebb and flow of life.

In the course of this paper, we will discuss the current state of employee health and describe how a decrease in employee wellbeing affects a company’s financial performance. Furthermore, we will describe the benefits of enhancing employee wellbeing and will illustrate how health and wellness coaching is an effective strategy to support leaders and the workforce. Lastly, we will highlight a case report in which group health coaching was aimed to support busy leaders as they took active steps towards cultivating their own wellbeing. The research suggests that when all employees are healthy and well, organizations increase performance.

Current State of Employee Health: Chronic Illness

Employers are faced with skyrocketing healthcare costs because of chronic illnesses and stress related conditions. According to the CDC, “Chronic diseases are common, costly, and debilitating, and they can often be prevented” (National Center for Chronic Disease Prevention and Health Promotion, 2017). Based on a RAND study in 2014, 60% of Americans had at least one chronic condition and 42% had multiple chronic conditions (Irving, 2017). Chronic conditions include heart disease, diabetes, obesity, back pain, anxiety, and arthritis and are often difficult to manage. Lifestyle behaviors such as healthy nutrition, adequate sleep, moderate physical activity, managing stress, and avoiding tobacco can help reduce the likelihood of chronic disease or improve quality of life for those already affected by a chronic condition. Surprisingly, in a 2016 study published in the Mayo Clinic Proceedings, however,

less than 3% of Americans meet the basic characteristics of a healthy lifestyle (Loprinzi, Branscum, Hanks, & Smit, 2016).

Stress

Defining stress is important as we understand the consequences of unresolved and unmanaged stress. According to the Mayo Clinic,

Stress is an automatic physical, mental, and emotional response to a challenging event and normal part of everyone's life. When channeled positively, stress can lead to growth, action and change. But negative stress can lessen your quality of life (Mayo Clinic, 2017).

This definition describes stress as a normal aspect of being human. Positive stress can increase focus, motivation, and can help us discover success. The stress threshold for individuals is highly personalized; an individual's sense of control or decision-making ability can affect how someone handles stress (*Workplace Stress*, 2017). When the stress cycle is not interrupted, chronic stress develops and leads to unhealthy behavior. Chronic stress can impact daily functioning as it affects sleep patterns, food choices, weight, physical activity, mental health, emotional regulation, and relationships. The lifestyle choices affected by stress, in turn, can affect workplace productivity and engagement.

Not only is our lifestyle behavior affected by chronic stress, stress is strongly linked to illness and disease. According to the Cleveland Clinic (2015), stress is linked to 6 of the leading causes of death: heart disease, cancer, lung ailments, accidents, cirrhosis of the liver, and suicide. Chronic stress affects nearly every system of the body – if stress is not managed, it will wreak havoc on our bodies. If individuals are not managing stress, the negative health consequences will appear in the workplace.

Anxiety and Depression

If left unchecked and unmanaged, stress can lead to anxiety and depression. According to the World Health Organization, more than 300 million people suffer from depression and anxiety which costs the U.S. economy \$1 trillion in lost productivity due to absenteeism and lack of engagement (*Mental Health in the Workplace*, 2017). It is estimated that 12% of all workers have been diagnosed with depression during their lifetime (Witters, Liu, & Agrawal, *Wellbeing*, 2013). Unchecked mental health issues can lead to serious concerns. The Journal of the American Medical Association's (2018) recent report describes that "deaths of despair" (deaths by drugs, alcohol, and suicide) are increasing amongst white, middle-class workers and is affecting the overall U.S. mortality trends. However, research suggests that employers who promote mental health and support people with mental health concerns are more likely to reduce absenteeism, increase productivity, and benefit from associated financial gain (*Mental Health in the Workplace*, 2017).

Burnout

Unchecked stress not only leads to mental and emotional health concerns, but can also result in burnout. Burnout results from excessive and prolonged stress and is regarded as a state of emotional, physical, and mental exhaustion (Smith, Segal, Robinson, & Segal, 2018). Symptoms of burnout can include disengagement, feeling of helplessness, loss of motivation, and exhaustion. Burnout diminishes job performance and translates into billions of dollars in losses annually to U.S. employers. Interestingly, a study conducted at Yale University in

collaboration with the Faas Foundation revealed data that one out of five employees reported high engagement *and* high burnout. Essentially, highly skilled *and* motivated employees are also experiencing stress and frustration. This particular group of top talent had the highest turnover which indicates that companies are at risk of losing top-performing employees when stress and burnout symptoms are not addressed (Seppala & Moeller, 2018).

Absenteeism

Absenteeism is a direct result of suboptimal employee health and wellbeing and can significantly affect an organization's bottom line. Circadian, a workforce solutions company, reported that absenteeism costs about \$3600 per year for hourly workers and \$2650 for salaried employees. For a company with 500 shift workers, this can result in about \$1.3 million of lost productivity (*Shift Work & Absenteeism: The Bottom Line Killer*, 2014).

Financial Impact

The body of literature is striking: chronic illness, stress, mental health, and burnout affect employees' health and wellbeing *and* impact a company's financial output. A Health and Human Service Report shows that healthcare premiums have *doubled* since 2013 (Health and Human Services, 2017). In an interesting report, General Motors spent more money on employee's healthcare than it did on the steel to manufacture vehicles (Blanding, 2015). According to Gallup, there is a significant disparity between health-related costs for employees who thrive and those who suffer. Employees who maintain optimal health and wellbeing pose a 62% lower cost compared to those with sub-par treatment. For an organization that employs 10,000 people, this amounts to nearly \$30 million (Robison, 2012). Tom Rath, leader and researcher with Gallup, and Jim Harter, Ph. D, Gallup chief scientist, describe that the health care costs of a 60-year-old with high wellbeing are *lower* than those for a 30-year-old with low wellbeing (Robison, 2012). Goh, a researcher who developed a mathematical model that assesses the impact of stress and negative outcomes, summates it well: "The workplace is where we spend a lot of time – a third of our day. It's an avenue for stress and an avenue for ameliorating stress, and by and large the costs are borne by employers" (Goh, Pfeffer, & Zenios, 2016). Clearly, it is in the best interests of leaders to foster employee health and wellbeing – it generates a win-win situation.

Employee Wellbeing

Before going further with making the case for improving employee wellbeing, it is important to define what "wellbeing" is. According to the Earl E. Bakken Center for Spirituality and Healing at the University of Minnesota, wellbeing is defined as "A state of balance or alignment in body, mind, and spirit. In this state, we feel content; connected to purpose, people and community; peaceful and energized; resilient and safe" (*Wellbeing*, 2018). Wellbeing includes health, but is multidimensional and evolves as individuals proactively and positively make choices to reach their full potential. With this broader definition of wellbeing – which bridges the mental, emotional, physical, and spiritual realms – organizations and employees can recognize the value of a holistic approach.

The Center for Disease Control and Prevention (2018) recognizes an expanded view of wellbeing as well. Wellbeing has taken priority so much so that the CDC measures Health Related Quality of Life (HRQOL) of U.S. citizens. HRQOL measurements are important from a

public health perspective to mobilize prevention and promote healthy behaviors. The workplace is in a primary position to affect wellbeing outcomes.

Not only has the health industry recognized the importance of a holistic approach to wellbeing, but organizations and leaders see it as a significant factor as well. The 2018 Deloitte *Global Human Capital Trends* (2018) suggests that employee wellbeing has become a strategic priority and responsibility to leaders of organizations. Innovative tools to promote mental health, mindfulness, sleep, and stress management are becoming important to support employee wellness. According to the authors, “*It is also a growing expectation among the talent companies most want to recruit, access, and retain. No longer an optional or narrowly focused element of the rewards menu, well-being is now front and center as a business imperative for leading, high-performance companies* (Agarwal, Bersin, Lahiri, Schwartz, & Volini, 2018).

Danielle Harlan, PhD, researcher, and CEO of Center for Advancing Leadership and Human Potential, stated that one of the struggles of leaders themselves is making their own health a priority. As work and stress accumulates, it is often difficult to make healthy choices (Prichard, 2017). Improving health and wellbeing is critical for all employees since it can create a ripple effect throughout the organization.

Undeniably, there is a correlation between an employee’s health and organizational performance. As a result of this growing body of literature, it is important to provide a greater understanding of the benefits of enhancing employee health and wellbeing. Research and literature support that wellbeing boosts employee engagement, retains top talent, and improves productivity/performance – which collectively result in a return on investment (ROI) (Witters & Agrawal, *Well-being Enhances Benefits of Employee Engagement*, 2015) (Rothausen, Henderson, Arnold, & Malshe, 2017).

Engagement, Performance, and Retention

Gallup has found that wellbeing and engagement are critical keys to employee performance. In a survey which measured five elements of wellbeing – purpose, social, financial, community, and physical health – it was discovered that those who reported higher well-being and high engagement are 30% more likely not to miss work in any given month (Witters & Agrawal, 2015). Furthermore, the study indicated that engaged and healthy employees were 45% more likely to report higher levels of adaptability to change and 59% less likely to look to change jobs (Witters & Agrawal, 2015).

Additionally, Gallup measured wellbeing and disease burden for specific chronic illnesses including high cholesterol, depression, and diabetes. Gallup created categories of overall wellbeing as “thriving, struggling, or suffering” (Ott, 2010). According to 2009 results, the annual disease burden cost for those who were thriving was \$2,976 per person and \$7,393 for those that were struggling or suffering – a 60% difference in cost (Ott, 2010). As healthcare premiums continue to be a significant cost to employers, utilizing health and wellness coaches may be one of the best ways to invest in human capital.

In another study on turnover and retention, authors developed a framework and used analysis to understand the role of identity and wellbeing in the workplace. Their findings demonstrated that retention has close ties to psychological wellbeing and how one manages six categories in life: purpose, growth, positive relationships, mastery, self-acceptance, and self-

determination. When employees experience a balanced amount of resources, they are able to achieve wellness (Rothausen, Henderson, Arnold, & Malshe, 2017).

Furthermore, according to survey results by more than 500 business leaders throughout the U.S., these employers recognize that health influences productivity by 62% and performance by 60% (Health Enhancement Research Organization, 2015). Health and wellness coaching specifically targets this opportunity and aims to increase employee's physical energy and improve mental and emotional health; this allows employees to focus on their tasks and are motivated to perform well (Albrecht, 2016).

Health and Wellbeing Coaching

Because of the increased need for wellbeing solutions in the workplace, leaders are discovering new strategies aimed at enhancing employee wellbeing. Health and Wellness Coaching (HWC) is one intervention that can be utilized as a catalyst to support employee wellbeing. According to the International Consortium for Health and Wellness Coaching:

Health and Wellness Coaches partner with clients seeking self-directed, lasting changes, aligned with their values, which promote health and wellness and, thereby, enhance well-being. In the course of their work, health and wellness coaches display unconditional positive regard for their clients and a belief in their capacity for change, and honoring that each client is an expert on his or her life, while ensuring that all interactions are respectful and non-judgmental (2018).

Framework

HWC is an emerging, transformational field focused on creating a shift on how individuals view health and wellness. When a whole-person approach is utilized, integrated strategies can help employees attain healthier behaviors (DeVries, 2010). Emphasizing prevention and proactive behavior, health and wellness coaches use research-based best practices to empower clients as they make steps towards change. National standards have strengthened the health coaching profession and in 2017, the initial wave of National Board Certified Health and Wellness Coaches (NBC-HWC's) passed the first HWC examination. Currently, close to 2000 individuals have obtained NBC-HWC credentials. At a time when leaders are faced with soaring healthcare costs due to chronic illness, stress, and burnout, HWC may help cultivate employee wellbeing.

Health and wellness coaching is not abstract idealism, it is science-based and grounded in human connection. Coaches partner with clients as they build self-awareness, recognize patterns of behavior or thinking, uncover obstacles, recognize the connection between vision, values, and purpose, and develop motivation for change. HWC has foundations in the fields of counseling, positive psychology, appreciative inquiry, prevention research, solution-based therapy, and motivational interviewing (Preston, et al., 2014). Health coaches and psychotherapists draw on similar frameworks and models which include self-determination theory, transtheoretical model, social cognitive theory, self-efficacy model, and nonviolent communication techniques. Additionally, health coaches pull from the latest findings in neuroscience, mindfulness, and the mind/body connection (Jordan & Livingstone, 2013).

Health Coaching Skills

The cornerstone of coaching is building the relationship between the coach and the client. Establishing trust and rapport fosters an environment where clients feel safe and empowered

to change and grow. Mindfulness, holding positive regard, expressing empathy, maintaining confidentiality, and helping clients discover their own answers are crucial to the relationship (Moore, Tschannen-Moran, Silverio, Larsen, & Compton, 2010). Additionally, there are core coaching skills that are consistently found throughout different coaching models. The skills include active listening, open-ended inquiry, and perceptive reflections (Moore, Tschannen-Moran, Silverio, Larsen, & Compton, 2010). Michael Arloski, a pioneer in wellness coaching describes how coaching evokes transformation. “Coaching is so much about change. A change in behavior, in performance, in accomplishment, in attitude, and belief. Wellness, real wellness is about personal growth and maximizing human potential” (Arloski, 2014).

Self-Awareness

An essential element of HWC is creating an alliance with the client as they develop self-awareness. Self-awareness is the ability to notice feelings, thought patterns, and physical sensations, and to hone into habits, patterns of behavior, and ways of living and being in the world. Self-awareness extends to a person’s understanding of goals, strengths, weaknesses, values, beliefs, purpose, and meaning (Goleman, 1996). According to Bill George, former CEO of Medtronic and Senior Fellow at Harvard Business School, “Self-awareness is the foundation of authenticity, and thus it is at the center of your compass. You develop it by exploring your life story and then understanding the meaning of your crucibles” (George, 2015).

There is significant literature on the importance of building self-awareness, especially for leaders managing a team. Anthony Kjam, CEO and Managing Partner and Founder of Cue Ball and author, describes that cultivating self-awareness is the best thing leaders can do to improve their effectiveness. It allows leaders to project conviction, stay open to new ideas and opposing views, and embrace vulnerability while leading with humility (Tjan, 2012). Self-awareness enhances Emotional Intelligence (EQ) which allows an individual to recognize and understand emotions in oneself and the ability to apply this awareness to manage relationships. This is especially important for leaders as to not allow emotions to control behavior and become “emotionally hijacked” (Bradberry & Greaves, 2009). Health and wellness coaches use tools and strategies to support clients as they cultivate self-awareness. The expected outcome includes optimizing emotional intelligence and self-awareness and ultimately improving the health and wellbeing of valued employees.

Individual and Group Coaching

Health and wellness coaching can be delivered both individually and within a group setting. The majority of literature and research on health and wellbeing coaching has centered around individual health coaching, however, group coaching is also showing potential. Group coaching is cost effective for organizations, creates a “sense of community” to support positive change and engagement, encourages accountability, and may help foster overall wellbeing of the members (Armstrong, et al., 2013). Though there are few differences in how health and wellness coaching is delivered individually versus a group, the core foundation of the profession remains the same.

Case Report

As a way to promote a healthy lifestyle and manage stress, group health and wellness coaching was offered to leaders of a large health care organization in the Midwest. This case report is relevant to organizational leaders because it provides a concrete example of how

coaching can assist employees as they manage stress, cultivate holistic wellbeing, and take active steps towards attaining positive behavior change and growth.

Method

The non-profit, metropolitan-based healthcare organization that participated in group health and wellness coaching employs over 30,000 people and offers a system-based framework in promoting health and wellbeing. The target recruitment audience for the virtual health and wellness group consisted of employees who had participated in a leadership development cohort. Marketing was delivered to potential participants as “Juggling it all: Health Coaching for the Busy Leader.” The intention of the group was to improve general wellbeing and lifestyle within a group of leaders who are managing change and stress. Interestingly, the facilitators received over 20 inquiries from leaders about group participation. Clearly, this type of group was needed. After timing criteria was established, it was determined that eight individuals were able to commit to five group sessions which were held remotely using a web conferencing platform. Two senior health and wellness coaching graduate students facilitated the coaching sessions.

Cohort

The co-facilitators conducted 1:1 interviews with the participants prior to the initial group meeting. The employees were asked screening questions such as, “What prompted you to enroll in group health and wellness coaching?” and “What are your health and wellness goals?” Additionally, the facilitators answered employee questions or concerns, discussed confidentiality, logistics, and commitment. The ages of the cohort ranged from 31 – 52 and included six women and two men. Interestingly, all eight members worked in different buildings across the metropolitan region. The participants identified as managers/leaders of various departments including the positions of clinic manager, cardiopulmonary manager, IT disaster recovery, and regional manager. Several participant-generated themes became apparent: improving work/life balance, developing stress management strategies, increasing self-care, focus on healthy living, the desire for accountability and lasting change, and learning tools to disseminate to staff. After the initial interviews, the cohort was sent confidentiality and consent forms (Appendix A & B) and a Perceived Stress Survey (PSS - Appendix C).

Session Summaries

While each group session was distinct, the facilitators stayed with the initial intent of the group which included strategies for stress management, incorporating balance, improving lifestyle choices, and cultivating overall health and wellbeing. During the first and second sessions, focus was on building cohesion and trust, raising awareness of members’ current health and wellbeing, discovering values, and exploring health and wellbeing vision. The group members shared reflections on areas such as the importance of self-reflection, building in time for self-care, releasing guilt, giving up control, and making themselves a priority. A few participants began to experiment with setting action steps.

During the third and fourth session, the theme of energy management was explored. The group reflected on energy drains and energy renewal using a holistic lens (Schwartz & McCarthy, *Manage Your Energy, Not Your Time*, 2007) and discussed how to foster energy by connecting to their meaning, values, and purpose. Topics such as busyness, noticing shifts, reframing, and expanding perspectives were covered. The cohort shared thoughts about being

emotionally available for others, checking expectations, noticing thought patterns, and increasing physical activity. The members scaled their confidence and motivation and then arrived at action steps by developing SMART goals (Moore, Tschannen-Moran, Silverio, Larsen, & Compton, 2010). SMART goals encompass Specific, Measurable, Action-based, Realistic, and Timely behavioral objectives which are scaled specifically to each person based on intrinsic value. Though the cohort expressed feeling high levels of stress, members stated they felt better about their goals and had something to work towards.

During the final session, the facilitators summarized the session themes of work-life balance, self-care, energy management, SMART goals, obstacles, and small steps. Members discussed motivation, challenges and barriers, prioritizing, getting “out of my head,” and celebrations for meeting goals. Throughout the sessions, members consistently were engaged in the group process by participating in discussions, offering empathy and understanding to other group members, were open to learning, and demonstrated vulnerability. The chemistry of the group established a cohesive experience.

The group coaching experience is presented in the graphic summary below. The figure illustrates key elements that were evident in each coaching session and their flow (see *Figure 1* and *Appendix E*).

Figure 1: Group coaching timeline graphic summary—illustrates the group coaching experience by each session.

Pre-group coaching interviews	<ul style="list-style-type: none"> • Focus - Explored focus areas for each member and hopeful takeaways from group coaching • Assessment - Each member completed Perceived Stress Scale (PSS), Health and Wellness Wheel (HWW), confidentiality and consent forms • Emerging themes - Work/life balance, reduce stress, healthy living, increase motivation, create lasting change around lifestyle choices, adapting to change, introduced idea of self-compassion
Session 1	<ul style="list-style-type: none"> • Focus - Establishing group ways of working, create connection, discussion of Health and Wellness Wheel, noticing gaps, discuss what balance/juggling it all means to each person • Coaching Tools - Appreciate Inquiry (AI), Four Pillar model of HWC, Health and Wellness Wheel • Emerging themes - Building awareness around the HWW, being intentional with choices, prioritizing healthy eating and activity, building motivation, expanding group connections • Takeaways - Increase self-awareness, self-compassion, desire to be more well-rounded, increase self-care and motivation
Session 2	<ul style="list-style-type: none"> • Focus - Explore new insights from HWW exercise, introduce energy management, turning off auto-pilot, connect to values • Coaching tools - Mind, body, breath awareness, AI pertaining to energy management • Emerging themes - Need for balance, importance of self-care, living this 'one life', refocus energy • Takeaways - Importance of relaxing, giving up control, stick to core values, refocus energy, soul searching, feelings of empowerment
Session 3	<ul style="list-style-type: none"> • Focus - Energy management, balance, living one life - relate to values • Coaching tools - Mind Map tool - expanding perspective on energy drains and energy renewal, group members created action step around goal (SMART goal) • Emerging themes - Focused on mental, emotional, physical, and spiritual realms • Takeaways - Increase physical activity, get outdoors, mental check-ins, nutrition awareness
Session 4	<ul style="list-style-type: none"> • Focus - Discuss SMART goals and action steps, challenges, and obstacles • Coaching tools- Utilized MI and AI concepts around goal setting, reframing/expanding perspective • Emerging themes - Hectic pace of life, care of others before oneself, being busy and including self-care, small steps and short term goals • Takeaways - Accepting help, feelings of relief and calm, excited, importance of self-care, SMART goal was helpful
Session 5	<ul style="list-style-type: none"> • Focus - Closing the coaching relationship, recap, challenges/barriers to goals, building resiliency • Coaching tools - Utilized AI, ladder exercise/scaling on SMART goals, envisioning • Emerging themes - Feeling motivated, prioritizing, getting “out of my head”, accountability, sharing intention, breaking down goals into smaller stages is helpful • Takeaways - Vision to move forward in relationships, “I’m not alone”, increase self-care and relaxation, being self-aware is important, re-energizing, utilize resources, give deliberate focus on goals

Coaching Theories/Skills/Tools

The Four Pillar model of health and wellbeing coaching—which includes mindful presence, authentic communication, self-awareness, and establishing a safe space – was kept as a framework for all coaching sessions (Lawson, 2015). Additionally, several other theories and tools were used as the group moved forward from exploration to making changes. At the beginning of each session, the coaches introduced grounding exercises as a way to reset and focus, bringing forth the concept of mindfulness. The check-in questions invited reflection, provided a “pulse” of each member, and represented an opportunity to build group cohesion and trust. Using elements of Motivational Interviewing (MI) added value to sessions to increase self-awareness, build and emphasize individual strengths, and demonstrate active listening skills. The spirit of MI was also utilized as the coaches recognized stages of change, readiness, resistance, and used scaling to measure confidence and motivations towards the implementation of action steps (Wagner & Ingersoll, 2013). Additionally, Appreciative Inquiry (AI) was utilized to allow the cohort to discover where they are, dream about where they would like to be, design a plan, and discuss how to deliver lasting change (Orem, Binkert, & Clancy, 2007). AI was integrated into the sessions using a health and wellbeing wheel, reflection, discussion, and mind-map. Additionally, applying Peter Drucker’s concept of SMART goals was helpful in developing clarity, focus, and motivation towards behavior change (Harvard Business Publishing Staff, 2017).

Evaluation Tools

Each leader completed *The Perceived Stress Survey* (PSS) prior to our first session and after the final session. The PSS is a validated assessment tool which was developed in 1983 and is designed to measure self-determined individual stress levels. The 10 question scale measures thoughts and feelings on how different situations affect perceived stress (Cohen, 1983).

Subjective evaluation tools were utilized for the cohort as well. Shannon Yocum, one of the facilitators, adapted Michael Arloski’s Life Wheel (Arloski, 2014) and developed a Health and Wellbeing Wheel (HWW – Appendix D). Members were invited to measure their satisfaction in ten categories: career, finance, health, friends, family, personal growth, relaxation, fun/joy, mental/emotional, and spiritual. This discovery tool provided a unique model to indicate to clients where they were and invited them to visualize where they would like to be. Additionally, the facilitators invited the leaders to use a mind-mapping technique during session three to creatively brainstorm and explore the topic of energy renewal and energy drains, utilizing a holistic perspective. A mind map is an engaging tool that organizes thoughts, creates associations, and generates new ideas (Knight, 2012). After completing two mind maps, the group was then invited to create initial action steps with which the members could experiment.

Quantitative Outcomes

The group coaching outcomes showed positive change and growth. The PSS scores 0 - 13 as low stress, 14 – 26 moderate stress, and 27 – 40 high perceived stress. Results prior to our first session ranged from 10 -20 with the average 16.25. After the final session, members completed the PSS again and the results ranged from 7 – 24 with the average score of 14. Six of the members decreased their perceived stress, while two members post group showed an increase in stress. One member with a newborn who returned to work recently noticed an increase in stress and shared via email, “... last time I took it (PSS) I was fresh out of maternity

leave and didn't have as much on my plate yet at work. Now I'm back into the trenches and am struggling to keep up again." She reported that participating in group coaching has prompted her to take an hour during the work day to "step away from the chaos" and focus on her health and wellbeing. The other member was still recovering from a flooded office, relocation, and then return to her office space. The feedback from several of the participants reinforced the perspective that ongoing health and wellness coaching could be beneficial to them as they continue to encounter ongoing obstacles and stress.

Each leader completed the HWW prior to the first group meeting and then posted the last group. Members expressed that the wheel increased their self-awareness of who they are, what they value, and where they would like to be in the various categories. Numbers on the wheel ranged from 1 - 10, with 1 being low and 10 being high. Several members indicated "closing the gap" in several categories between the first session and final session. For example, one participant scored herself at 3 for mental and emotional health and would like to see herself move towards 7. Another participant scored himself at 4.5 for relaxation and was working towards improving to an 8. By the end of the five sessions, all the members increased their scores in several of the wellbeing categories.

Qualitative Outcomes

Lastly, a qualitative survey was delivered to the group one week after the last session. When asked what new self-awareness they gained from group coaching, responses included:

The importance of prioritizing time for myself. How important balance is. How much I'm neglecting my own health, relaxation, personal growth, and mental health. When I have a motivation/venue/environment that encourages me to deliberately focus on a personal goal, I can easily achieve it.

Responding to how self-awareness has impacted their health and wellbeing, members responded,

It has reduced my stress levels and increased my abilities to respond to issues in a positive and productive manner. I feel more energized than I did. I am more proactive. I've been able to set and reach some small and health and well-being goals, it inspires me to keep up the momentum!

Personal Experience and Perspective

Though the following paragraph represents interpretation, I (Yocum) feel it is important to share my personal perspective of the group coaching experience as I was one of the facilitators. Our group covered many topics related to health and wellbeing. It is difficult to put into words the subtle nuances, group dynamics, energy exchange, and "ah-ha moments" that occurred in the group, however my biggest takeaway from the group is that I noticed their increased understanding of the importance of taking care of themselves so they could be more effective leaders and co-workers as well as better engaged with family and friends. This tangible experience has convinced me that now, more than ever, people need active listening, authentic communication, and time to self-reflect to reconnect to vision, values, and purpose. People are looking for connection personally and professionally. I truly believe that by creating an alliance with the participants, members felt non-judged, safe, and could explore what is going on within. To put it simply, the inside-out approach of health coaching fostered

momentum for change. I felt honored and humbled to hear their takeaways and vision during the final session:

I am not alone; my vision is to increase relaxation and accept help. I learned to make time to mindfully and meaningfully connect to myself, environment, and others. My vision is to give deliberate focus on what affects my energy. Being self-aware is important; doing things to reenergize and spend energy on myself are my takeaways. Vision moving forward: practice self-care when things are out of my control – then I'm able to have better self-realization.

Discussion

The leaders who participated in group coaching were able to gain self-awareness through a holistic approach of health and wellness, understand the importance of self-care/stress management, explore energy management, create SMART goals, experiment with action steps, and address barriers and obstacles. While the individual members gained new perspectives, they were also able to empathize and collaborate with other members while gaining energy and motivation from each other as they moved towards positive change. Though health and wellness coaching is not yet standard in all organizations, this case study supports the advancement and importance of coaching as an encouraging intervention to foster employee wellbeing.

Strengths

The strengths of health and wellness coaching for individuals in organizations correlates well with current research. Though health and wellness coaching has become a “best practice” as an avenue for health promotion and maximizing behavior change effectively (Chapman, Lesch, & Baun, 2007), it is still an emerging field. As chronic diseases continue to rise and account for 70% of U.S. deaths, health coaching can be a utilized strategy to promote healthy lifestyle behaviors such as nutrition, increasing physical activity, weight management, and medical adherence (Olsen & Nesbitt, 2010). As stress levels of employees continue to rise, employers are incorporating stress management interventions as a component of wellness initiatives (Richardson, 2017). Analysis of various stress management interventions and approaches such as mindfulness, relaxation, and cognitive-behavioral theories suggest that multimodal interventions are effective in improving individual health and reducing stress (Tetrick & Winslow, 2015). Several prominent and respected organizations have recognized the importance of mindfulness practices. Google, Aetna, Target, and General Mills invest in mindfulness programs as they realize the positive impact that reflection and thoughtfulness can bring to the organization (Schaufenbuel, 2015). Health and wellbeing coaching centers around those very tools, strategies, and theories.

Health Coaching Effectiveness Research

As literature on health and wellness coaching grows, research on coaching effectiveness is increasing. In a meta-analysis, the authors evaluated coaching effectiveness in organizational settings for individual outcomes. Study outcomes were categorized into performance/skills, wellbeing, coping, work attitudes, and goal-directed self-regulation. Results indicate that coaching has significant positive impact in all categories (Theebom, Beersma, & van Vianen, 2013). In another study published by the Mayo Clinic, researchers studied the potential benefits of coaching on quality of life (QOL) within five wellbeing domains: mental, physical,

emotional, social, and spiritual. Participants completed 12-week-in person wellness coaching. Results present that individuals reported significant improvements in QOL and psychosocial functioning. Interestingly, at a 24-week follow-up, participants maintained this improvement (Clark, PhD, et al., 2014). Another recent study demonstrates how positive and negative coaching interventions affect the brain by evaluating participants' fMRIs. Results reveal that when coaching centers around an individual's strengths, goals, and dreams, it activates the parasympathetic nervous systems which has been shown to enhance behavioral change and motivation (Jack, Boyatzis, Khawaj, Passarelli, & Leckie, 2013).

Limitations

There are limitations of this group health coaching case that should be mentioned. While overall the group improved their perceived stress scores, the coaches were unsure if individuals had the tools and motivation for long-term change and sustainability because it was not possible to perform a longer-term follow-up assessment. This experience has sparked curiosity about whether, after group coaching, individual health and wellness coaching would be additionally beneficial to members as they continue to work towards growth and change. As aforementioned, time was a limitation. Perhaps more time (length, frequency, and coaching duration) could prove even more helpful to the leaders as they continue to face the challenge or opportunity of "juggling it all." Lastly, one other potential limitation exists. How effective is virtual coaching versus in-person coaching? Because virtual coaching is relatively new, it is an area that would benefit from further research. As health and wellness coaching continues to create credibility as a profession, more exploration of the limitations is essential.

Conclusion

There is no magical remedy to fix the complexities that people face on a daily basis; stress, lifestyle choices, and chronic illness will continue to affect individuals. Therefore, looking to upstream strategies to enhance employee wellbeing is a critical concern. This case report is important because it provides a snapshot of real-life struggles and obstacles that *all* employees face; leaders are no different than entry-level employees. Nonetheless, the dynamic approach of health and wellness coaching has shown traction for cultivating and supporting leader and employee wellbeing. Organization performance and stability is directly influenced by human capital. Ultimately, when leaders focus on their own wellbeing, it becomes mutually beneficial: what is good for the employee is also good for the organization. Forward-thinking companies and leaders see the need for a radical shift in how they are approaching health and wellness and are able to visualize the connection between employee performance and wellbeing. Health and wellness coaching might be the critical key to bridge the gap between the current state of employee health and optimal business performance.

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About the Authors

Shannon Yocum is an Integrative Health and Wellness Coach and owner of Kaleidoscope Health and Wellness Coaching in St. Paul, Minnesota. Shannon believes that health and wellbeing is about creating conscious choices that enhance our lives and those around us. She supports individuals, groups, and organizations as they expand awareness of wellbeing and take active steps towards growth and change. Shannon holds a master's degree in Integrative Health and Wellness Coaching, through the Center for Spirituality and Healing, from the University of Minnesota. Additionally, she holds her bachelor's degree in School Social Work from the University of St. Thomas. She is among the first in the nation to become a National Board Certified Health and Wellness Coach (NBC-HWC).

Ms. Yocum can be reached at yocum016@umn.edu.

Karen Lawson, MD, ABIHM, NBC-HWC, an assistant professor of University of Minnesota's Family Medicine and Community Health, is Co-Director of Integrative Health Coaching at the Earl E. Bakkan Center for Spirituality and Healing (www.csh.umn.edu). She is a physician, board-certified in both Family Medicine, and Integrative and Holistic Medicine. She was the 2003/5 President of the American Holistic Medical Association, and a founding Diplomat of the American Board of Integrative and Holistic Medicine. Non-medical trainings have included mind-body techniques (e.g. MBSR), yoga, dance/movement therapies, nutrition, homeopathy, and a 20-year study of shamanic practices. Dr. Lawson is active in undergraduate and graduate medical education; teaches in the Center's graduate courses; and, since 2005, founded and directs the MA and graduate certificate programs in Integrative Health and Wellbeing Coaching. Karen is a co-founder and executive leader of the *National Board for Health and Wellness Coaching* (www.nbhwc.org).

Dr. Lawson can be reached at lawsonk@umn.edu.

Appendix A

The clients, whose health and wellness coaching story comprises the case in this Concept Analysis and Case Report, have signed a Consent Form which is stored in a secure server file at the University of Minnesota, Bakken Center for Spirituality and Healing.

CONSENT FORM

**For Group Health Coaching
Provided by the University of Minnesota
Master of Arts in Integrative Health and Wellbeing Coaching Program**

Background:

You are agreeing to participate in Integrative Health and Wellbeing group coaching. This group coaching is facilitated by one or more graduate students currently enrolled in a required Health Coaching course of the University of Minnesota Master of Arts in Integrative Health and Wellbeing Coaching Program.

Group coaching sessions are audio recorded, de-identified and documented in written notes. These de-identified records are securely stored electronically for a period of up to seven years, after which time they are permanently deleted. The stored records may be reviewed by the Group Coaching Course instructors for quality purposes, and are used by a student to complete the Group Coaching Course requirements. A student enrolled in the Master of Arts in Integrative Health and Wellbeing Coaching Program may subsequently use the stored group coaching course records to complete requirements for the Master's Program Capstone Project course.

I ask that you read this form and ask any questions you may have before agreeing to participate.

This group coaching is being facilitated by: Megan Lundahl and Shannon Yocum, graduate students in Health and Wellbeing Group Coaching (CSpH 5709), one of the University of Minnesota's Master of Arts in Integrative Health and Wellbeing Coaching Program courses. Supervision for this student is provided by Deb Olson olso3768@umn.edu and Theresa Nutt tanutt@umn.edu.

The purpose of this group coaching is to:

1. Provide you with the opportunity to increase your awareness and confidence in managing your health and wellbeing.
2. Provide the graduate student(s) with experience in facilitating group coaching and gathering information to complete assignments for coursework in their graduate program.

Selection: You are selected as a participant in group coaching because you personally choose to participate.

Procedure: If you agree to participate in group coaching, I ask that you do the following: Consistently participate in a total of **five 75-minute group coaching sessions**, facilitated once a week for five weeks. The sessions are documented in de-identified and securely stored audio

recordings and written notes that are used to complete course assignments. **By agreeing to participate in group coaching, you also give consent to be recorded for educational purposes only.** You have the option to withdraw from coaching at any time for any reason.

Risks and Benefits:

Participating in group coaching has no known risks.

If your de-identified coaching information is used to complete the Master of Arts in Integrative Health and Wellbeing Capstone Project Case Report assignment, completed in the final course of the Master's Program, the Case Report will be made available to you, if you so choose.

Confidentiality:

All recorded and written content of the group coaching sessions will be held confidential (except in the case you express intent to harm yourself or another). All confidential records are securely stored, and used solely to complete course assignments.

If you participate through an employment site, the content of your coaching will not be shared with your employer or for any purpose outside of academic needs.

Group coaching participants will disclose only their first names during coaching, and sign an additional agreement to hold confidential any and all information shared during group sessions by any and all participants.

If your coaching information is used to complete a Case Report which is subsequently published, the Case Report will not include information that will make it possible to identify you as a subject.

Voluntary Nature of Participation:

Your decision whether or not to participate in group coaching is entirely up to you, and will not affect your current or future relations with the University of Minnesota. If you agree to participate in group coaching, you have the option to withdraw from coaching at any time, for any reason, without affecting those relationships.

Contacts and Questions:

The students conducting this coaching are Megan Lundahl and Shannon Yocum. The coaching is being facilitated as required to complete assignments for the Master of Arts in Integrative Health and Wellbeing Coaching Program courses indicated below:

- X CSpH 5709: Health and Wellbeing Group Coaching
- CSpH 8191; Independent Study (optional)
- CSpH 8701: Master of Arts in Integrative Health and Wellbeing Coaching Capstone Project

You may reach the instructor of the Course by phone: 612-624-5166. This is the main number for the Master of Arts in Integrative Health and Wellbeing Coaching Program, Center for Spirituality & Healing, at the University of Minnesota.

You may email the Program: Erin Fider, Student Services and Academic Programs Coordinator fider002@umn.edu. The Program Director is Karen Lawson, MD, lawsonk@umn.edu.

Contacts and Questions, continued:

You may ask any questions you have now. If you have questions later, you may contact the group facilitators:

Megan Lundahl lunda019@umn.edu
Shannon Yocum yocum016@umn.edu

You will receive a copy of this form to keep for your records.

Statement of Consent:

I have read the above information. I have received answers to my questions. I consent to participate in Integrative Health and Wellbeing group coaching, and to be audio-recorded.

Signature _____ Date _____

Signature of Student _____ Date _____

Signature of Student _____ Date _____

Appendix B

**Confidentiality Agreement
For Group Health Coaching
Provided by the University of Minnesota
Master of Arts in Integrative Health and Wellbeing Coaching Program**

Background:

You have agreed to participate in Integrative Health and Wellbeing Group Coaching. This group coaching is facilitated by one or more graduate students currently enrolled in a required Health Coaching course of the University of Minnesota post-baccalaureate Certificate in Integrative Therapies and Healing Practices-Health Coaching Track, or the Master of Arts in Integrative Health and Wellbeing Coaching Program.

By signing this Confidentiality Agreement, you agree to maintain the confidentiality of all information communicated by other clients during Group Coaching. You also agree not to share information that leads to the identification of others in the group.

I ask that you read this Confidentiality Agreement form and ask any questions you may have before signing.

Contacts and Questions:

This group coaching is being facilitated by: Megan Lundahl and Shannon Yocum, graduate students in Health and Wellbeing Group Coaching (CSpH5709), one of the University of Minnesota's Master of Arts in Integrative Health and Wellbeing Coaching Program courses. Supervision for this group experience is provided by Theresa Nutt and Deb Olson.

You may ask any questions you have now. If you have questions later, you may contact the group facilitators: Megan Lundahl - lunda019@umn.edu or Shannon Yocum - yocum016@umn.edu.

You will receive a copy of this form to keep for your records.

Statement of Agreement:

I have read the above information. I have received answers to my questions. I agree to hold confidential all information communicated to me by other Integrative Health and Wellbeing Group Coaching clients, and not to share information that leads to the identification of others in the group.

Signature of Participant _____ Date _____

Signature of Student Facilitator _____ Date _____

Signature of Student Facilitator _____ Date _____

Appendix C

Perceived Stress Scale

A more precise measure of personal stress can be determined by using a variety of instruments that have been designed to help measure individual stress levels. The first of these is called the **Perceived Stress Scale**.

The Perceived Stress Scale (PSS) is a classic stress assessment instrument. The tool, while originally developed in 1983, remains a popular choice for helping us understand how different situations affect our feelings and our perceived stress. The questions in this scale ask about your feelings and thoughts during the last month. In each case, you will be asked to indicate how often you felt or thought a certain way. Although some of the questions are similar, there are differences between them and you should treat each one as a separate question. The best approach is to answer fairly quickly. That is, don't try to count up the number of times you felt a particular way; rather indicate the alternative that seems like a reasonable estimate.

For each question choose from the following alternatives:

0 - never 1 - almost never 2 - sometimes 3 - fairly often 4 - very often

- _____ 1. In the last month, how often have you been upset because of something that happened unexpectedly?
- _____ 2. In the last month, how often have you felt that you were unable to control the important things in your life?
- _____ 3. In the last month, how often have you felt nervous and stressed?
- _____ 4. In the last month, how often have you felt confident about your ability to handle your personal problems?
- _____ 5. In the last month, how often have you felt that things were going your way?
- _____ 6. In the last month, how often have you found that you could not cope with all the things that you had to do?
- _____ 7. In the last month, how often have you been able to control irritations in your life?
- _____ 8. In the last month, how often have you felt that you were on top of things?
- _____ 9. In the last month, how often have you been angered because of things that happened that were outside of your control?
- _____ 10. In the last month, how often have you felt difficulties were piling up so high that you could not overcome them?

Figuring Your PSS Score

You can determine your PSS score by following these directions:

- First, reverse your scores for questions 4, 5, 7, and 8. On these 4 questions, change the scores like this:

$$0 = 4, 1 = 3, 2 = 2, 3 = 1, 4 = 0.$$

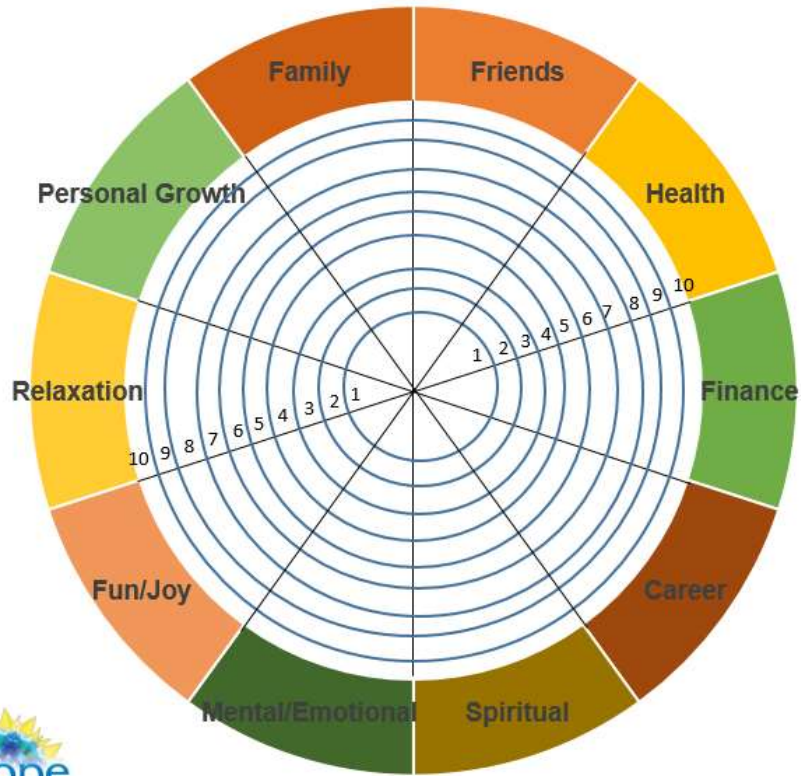
- Now add up your scores for each item to get a total. **My total score is _____.**
- Individual scores on the PSS can range from 0 to 40 with higher scores indicating higher perceived stress.
 - ▶ Scores ranging from 0-13 would be considered low stress.
 - ▶ Scores ranging from 14-26 would be considered moderate stress.
 - ▶ Scores ranging from 27-40 would be considered high perceived stress.

The Perceived Stress Scale is interesting and important because your perception of what is happening in your life is most important. Consider the idea that two individuals could have the exact same events and experiences in their lives for the past month. Depending on their perception, total score could put one of those individuals in the low stress category and the total score could put the second person in the high stress category.

Disclaimer: The scores on the following self-assessment do not reflect any particular diagnosis or course of treatment. They are meant as a tool to help assess your level of stress.

Appendix D

Health and Wellbeing Wheel



** Kaleidoscope Health and Wellness Coaching is a private coaching practice established by Shannon Yocum, one of the facilitators of the group coaching case study.*