



Health Coaches
AUSTRALIA & NEW ZEALAND ASSOCIATION



The Doctor's Guide to Health Coaching

AUSTRALIAN & NEW ZEALAND EDITION

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Introduction

Increasing numbers of doctors report feeling overwhelmed and burned-out. Health coaches can be part of the solution. Health coaches support medical practices and partner with doctors to create strong teams for patient care. When physicians add a health coach to their collaborative care team, the health of the patients improve, revenue increases, and the well-being of the providers themselves improves.

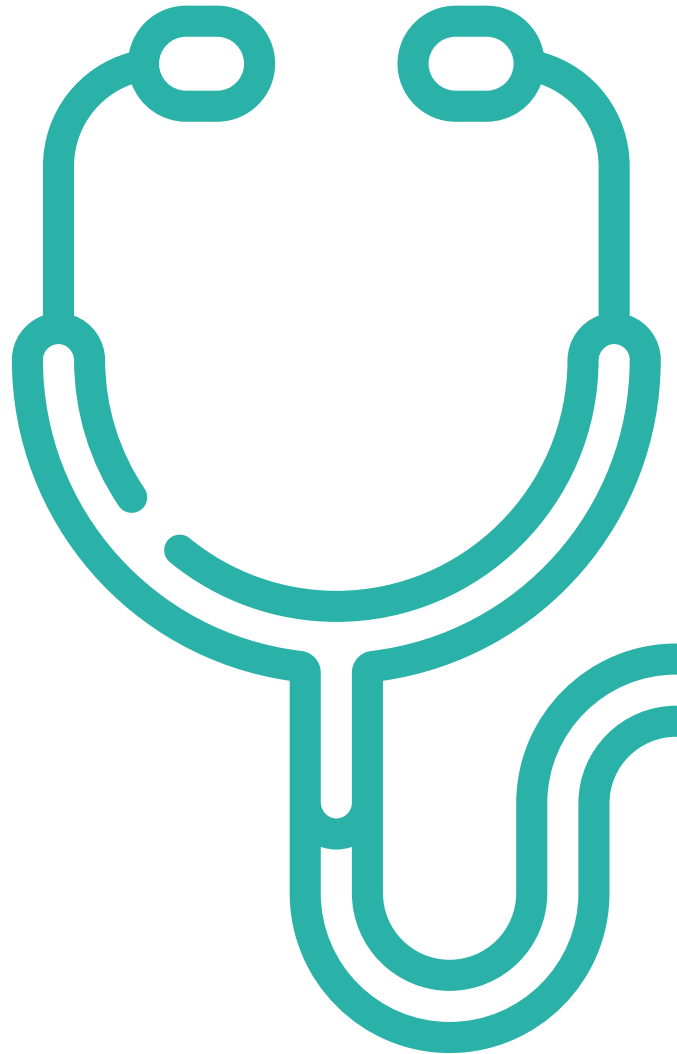
Health coaches support medical practices and partner with doctors to create strong teams for patient care. When primary care providers add a health coach to their collaborative care team, the health of patients improve, health literacy increase and the work balance and wellbeing of the providers themselves improves.

As the behavior change specialist, the health coach plays an important role on the collaborative care team.

A growing body of evidence demonstrates that helping patients initiate and sustain lifestyle changes improves their overall health and well-being. By creating a culture of wellness within the practice, health coaches can also positively impact the health and well-being of everyone in the organization.

“I don’t know how I would do what I do, and grow my business without a health coach.”

DR. COREY RICE



Because physicians didn't learn about health coaching in medical school, I created this guide to answer the following commonly asked questions:

**WHAT IS HEALTH AND
WELLNESS COACHING?**

**WHAT ARE THE VARIOUS WAYS
TO ENGAGE A COACH?**

**WHAT IS THE COACH
SCOPE OF PRACTICE?**

**WHAT SHOULD I LOOK FOR
WHEN HIRING A COACH?**

**WHAT ARE THE QUALIFICATIONS
FOR BECOMING A COACH?**

**WHAT ABOUT LEGAL COMPLIANCE
AND ETHICAL CONSIDERATIONS?**

**HOW CAN HEALTH COACHES
HELP MY PATIENTS?**

**HOW CAN A COACH BE A SOURCE
OF REVENUE FOR THE PRACTICE?**

**HOW DO DOCTORS AND
COACHES WORK TOGETHER?**

**IS THERE RESEARCH ABOUT THE
EFFECTIVENESS OF HEALTH
COACHING?**

What is Health and Wellness Coaching?



The Coach as Guide and Facilitator

Coaches bridge the gap between practitioners and patients, empowering people to take control of their health.

First and foremost, the health coaching model is patient-centred and non-directive. It consists of a combination of self discovery and self-monitoring, in addition to education, goal-setting and accountability. As the healthcare professional trained in behaviour change theory, motivational strategies, the transtheoretical model of change, and communication techniques, coaches use these methodologies to assist patients to develop intrinsic motivation and obtain skills to create sustainable change for improved health and well-being.

“Health & wellness coaches partner with clients seeking to enhance their well-being through self-directed, lasting changes, aligned with their values. In the course of their work, health & wellness coaches display an unconditional positive regard for their clients and a belief in their capacity for change, honouring the fact that each client is an expert on their own life, while ensuring that all interactions are respectful and non-judgmental.”

National Board for Health and Wellness Coaching, USA



The health coach toolkit consists of evidence-based interventions, including active listening, motivational interviewing, appreciative inquiry, positive psychology strategies, and SMART goal setting.

The coach empowers the patient to take charge of their health and the two work as a team. Essentially, individuals engage with coaches to support them, receive feedback and be held accountable. Health coaches guide people to transform their behaviour in order to live better, more fulfilling lives. Coaches provide a key ingredient: social support.

Health coaching typically incorporates health education, but encompasses so much more. Coaching provides a positive relationship that reinforces the client's ability to make lasting changes for better health and wellbeing. Most people experience a gap between knowing what they have to do and actually doing it. That's where coaching becomes relevant. Through a powerful dialogue that includes inquiry and reflection on strengths, values, and vision, coaches support their clients' transformation. Working with a coach closes the gap between intention and behaviour.

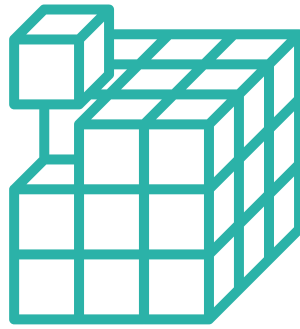
For patients suffering from chronic illnesses, the health coach acts as the patient's advocate and a facilitator through the web of practitioner care, as many of these individuals may have three to four doctors at a minimum to manage their symptoms. The health coach makes the difference between "getting doctor's orders" and actually following through.

"I tell the patients in my practice that our health coach is their friend who acts as the communication hub."

DR. ANUP KANODIA



The Coaching Structure



Health coaches meet with patients individually or in groups, in person, over the phone, or online. During the initial consultation, the patient tells their story, shares their vision for what they would like their life to look like, and together they determine the best number and type of sessions for a successful outcome.

During coaching sessions, the coach and patient collaborate to turn aspirations into achievable goals. Because coaching is a patient-centred process, the coach does not set the goals, but helps the patient establish them through an inquiry process. They help the client decide where they want to begin their journey towards better health. While the coach helps brainstorm ideas, the patient always arrives at their own conclusions. This is key to cultivating a sense of empowerment.

Next, the coach and the patient work together to break broad goals into smaller, more achievable ones. Specific goals might be formulated around nutrition, hydration, exercise, relaxation, sleep, stress, or interpersonal relationships.

A health coach educates and supports the patients as they make diet and lifestyle changes. But the process isn't just teaching them to eat this and not that, or get more sleep and reduce stress. A vital component of the coaching process involves helping people discover their own power to change.



The Coaching Process



Four key features produce increased patient engagement and commitment:

1

Establishing Rapport

Being in rapport means the ability to enter into another person's model of the world, and communicating that you truly understand that world in a congruent way. Perception of being understood must be established, as it's critical for engaging someone's trust and functions as the launching pad for actively leveraging the power of the coaching relationship.

Building rapport consists of creating the safety that allows the other person to be themselves and feel comfortable enough to risk change.

“They're not being heard and the health coach is someone who is there and has the time.”

DR. JABE BROWN

Melbourne Functional Medicine, Australia

2

Using Open-Ended Inquiry

Closed-ended inquiry usually has single word or “correct” answers. These are questions that do not require the patient to provide insight into their experience to answer. They tend to deal in the realm of facts more than thoughts and feelings. Questions that can be answered by a simple “yes” or “no” may close off the conversation.

3

Becoming an Ally

In patient-centred coaching, the coach takes the patient's side as a way of facilitating the best possible outcome, no matter what happens, no matter what the patient does or doesn't do. Coaches who act as a genuine ally choose to see each of their patient's choices as purposeful.

In instances where the coach as ally doesn't understand particular choices that the patient made, they employ open-ended inquiry to look for strengths and elicit the patient's intended positive outcome. In this type of relationship, the patient knows that the coach is a staunch supporter and will remain by their side, no matter what choices they decide to make or not make. As a result, they typically remain open to opportunities to try new tactics, particularly when their choices haven't yielded the results they want.

Being an ally involves maintaining unconditional positive regard for the patient. A defining principle of humanistic psychotherapy, it's the act of seeing another person as perfect and whole at the present time, regardless of their behavioural choices. The coach accepts the patient as they are. By doing so, and refraining from judgment, the client perceives the coach as being "on their side."



4

Creating a Meaningful Connection

In a client-centred relationship, the coach is both the teacher and the student, the leader and the follower. Both coach and patient benefit from the meaningful connection that their relationship provides. A sense of belonging and positive connections to others help people establish wellness in their lives. Research in positive psychology supports the power of meaningful relationships.

The Positive Psychology Approach



Positive psychology looks at how to nurture what is best within people to help them thrive. Coaches trained in this model help clients discover their signature character strengths and use them to change behaviours, find well-being, and lead more meaningful lives.

I believe that the most important job of a health coach involves creating a partnership with patients to discover the mental, emotional, and spiritual components that drive their motivation to heal. Both from personal and clinical experience, I've seen that people change when their minds and hearts change, and when their beliefs about what's possible changes.

“If I say, “ take a pill,” that’s easy. But if I say, “change your lifestyle or eat differently,” those are difficult changes to make. People do better when they have support. I include health coaches in all of my online programs, my programs at The UltraWellness Center, and the Center for Functional Medicine at the Cleveland Clinic. Having health coaches on my team ensures that each and every individual gets healthy and more importantly, stays healthy. I can tell my patients what to do, but if they don’t do it, it doesn’t matter.”

DR. MARK HYMAN



What is the Health Coach Scope of Practice



What's outside the scope of practice?

Health coaches are not licensed providers. They cannot take the place of a medical doctor, mental health or nutrition professionals unless co-qualified. The following is outside the coaching scope of practice:

- Diagnosing medical or psychiatric conditions
- Developing treatment plans
- Providing psychotherapy
- Ordering and interpreting lab testing
- Recommending supplements

The coach does not make recommendations; they listen, ask questions, and educate. They support patients by helping them mobilise their internal strengths and external resources. They provide guidance by clarifying the physician's diagnosis and plan, and referring to resources from national-recognised authorities and evidence-based research.

“Health coaching allows me to get better results for patients with higher compliance without me needing to take the time myself. It means I can focus on what it is I do best.”

DR. CHRISTIAN BATES



What are the Qualifications for Becoming a Health Coach?



Health and wellness coaching in Australia & New Zealand is an un-regulated industry. Health Coaches Australia & New Zealand Association (HCANZA) is the peak industry body establishing recognised standards for training of coaches within the region.

These standards provide a useful benchmark for recognising quality in training and continuous professional development.

HCANZA recognises national and international health and wellness coaching programs. The Functional Medicine Coaching Academy is recognised by HCANZA as meeting these standards

These standards include:

- Internationally recognised and developed core competencies in coach training curriculum
- Minimum numbers of hours training in coaching core competencies. Training hours delivered in synchronous and asynchronous formats.
- Health and wellness coach program faculty standards in both trainer's credentials and experience within coaching, health and lifestyle areas.
- Supervised and evaluated practical demonstrations by students of the attainment of core coaching skills
- Commitment to a Scope of Practice and Code of Conduct

Do health coaches need prior training in a healthcare field?

In Resonant Leadership, Richard Boyatzis describes three elements as key to positive interactions: mindfulness, hope and compassion. Those who become health coaches describe a passion for helping others and a desire to serve. Put this together with mindfully listening, conveying hope, and showing compassion and you have the prerequisites for becoming a health coach.

Coaches do, in fact, come from all walks of life, including corporate, education, entrepreneurship, legal, marketing, and stay at home parenting. Some of the best health coaches come from outside of healthcare. Many choose coaching after training to working in healthcare fields, including nursing, medicine, pharmacy, physical or occupational therapy, and nutrition. Others have prior experience in the wellness and food industry, such as fitness trainers, yoga/-Pilates instructors, and chefs.

Do coaches need formal training in nutrition?

When doctors contact FMCA to find a health coach for their practices, they frequently confuse health coaching with dietetics. The two disciplines are quite distinct and each of these professionals belongs on the collaborative care team. Effective health coaching requires a skill set that's distinct from the requirements to become a nutrition professional. The curriculum of robust certification programs for health and wellness coaches differs from the educational content that nutritionists and dietitians receive. Training in the patient-centred approach to behaviour change requires specialised education that incorporates both a deep dive into the study of coaching principles along with adequate time in their course of study for experiential learning and practice coaching.

As a result of highly-specialised training, health coaches function as experts in behaviour change. They help facilitate change across all of the modifiable lifestyle factors, not just nutrition. Therefore, at FMCA, our training provides education about exercise/movement, sleep and relaxation, relationships, and stress management, in addition to nutrition and the psychology of eating.

Rather than being experts in nutrition, coaches refer to the expertise of nutrition professionals and other medical experts. However, many health coaches do have prior training in nutrition and are licensed nutritionists or registered dietitians. But this training is by no means a prerequisite to becoming a successful health coach. In fact, many who come from previous healthcare fields where they were accustomed to acting as the expert who “told the patient what to eat” struggle with the patient-centred approach.



How Can Health Coaches Help My Patients?



“We consider coaching the most powerful tool that our practice has”.

DR. CHENG RUAN

Here’s but a few of the crucial ways that coaches support patients:

- Take the time to truly listen
- Provide education and clear up confusion
- Ensure that patients understand the plan of care
- Facilitate problem-solving
- Promote self-management
- Resolve ambivalence
- Ensure adherence to the treatment plan
- Help patients set realistic goals for behaviour change
- Provide crucial emotional support
- Celebrate tiny wins
- Help patients persevere despite obstacles
- Bridge the gap between the practitioner’s recommendations and carrying them out
- Act as the patient’s advocate and personal cheerleader

With a health coach on the collaborative care team, your time is freed up. As a result, you can not only engage in the medical detective work that they were trained to do, but can pursue interests outside of work, engage in self-care practices, and devote more time to family and friendships. All of these factors contribute to reduced feelings of exhaustion and less burn-out.

Did you know that coaches also contribute to the health of the physician and other allied professionals? When a practice has a health coach in the office, everyone benefits from the culture of wellness that they bring.

How Do Doctors and Coaches Work Together?

“Our integrated team consists of doctors, nutritionists, nurses and health coaches. During their first visit, patients will spend an hour with a physician, an hour with a nutritionist and 15 to 30 minutes with a health coach. In fostering collaboration, we took away the hierarchy between physicians, nurses, nutritionists, and health coaches. Everyone on the team works collaboratively and listens to one another”.

DR. MARK HYMAN

Does the doctor give the coach specific things to work on with the patient?”

I often hear this question when I give workshops to practitioners about the value of health coaching.

As the doctor, you determine the diagnosis and create the treatment plan, followed by a discussion with the coach regarding broad objectives for the coaching sessions. These may include lifestyle changes and medication and/or supplement adherence.

It's important to keep in mind that neither the physician nor the health coach determines the specific agenda for each session. That's the role of the patient.

Patients frequently reveal more to health coaches than to practitioners. Unwittingly or not, the doctor may be viewed as the authority figure and office visits are perceived as rushed. As a result, important feedback regarding compliance may not be disclosed and underlying issues not mentioned, often out of shame or embarrassment. In contrast, the coaching relationship is perceived as a "safe", nonjudgmental space and the coach seen as a peer or confidante.

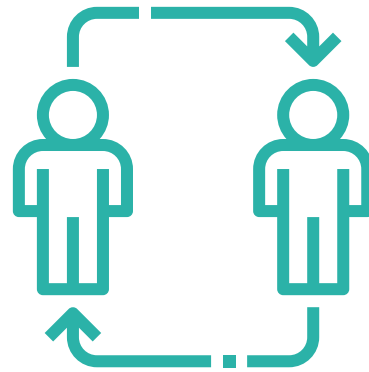
How much is the coach bringing in their own training?

Expect the coach to bring their expertise in building rapport, creating an alliance with patients, and helping them find their meaning and purpose in order to engage in behaviour change and carry out your treatment plan.

First and foremost, they bring their training as behaviour change specialists.

Depending upon your specialisation and the needs of your patients, you may prefer engaging a coach who shares your specialisation. Some coaches may have advanced training in areas that you've identified as important for the growth of the practice, such as group medical visits or use of remote patient monitoring.

What are the Various Ways to Engage a Coach?



1. Refer to a coach in your community

If you're not ready to formally engage a coach, consider making a referral to a coach in your community. Since sessions will most likely be remote, consider forming a relationship with a coach from another state or country.

FMCA has a Find a Coach directory where you can locate a graduate who meet the needs of your patients. HCANZA also has a Find A Coach directory where you can search for FMCA trained coaches.

2. Send an existing team member to be trained as a coach

If you have an existing team member who is interested in pursuing coaching, you may consider sending them to complete an approved coach training program.

For a current list of HCANZA-approved Health & Wellness Coaching Programs, visit the HCANZA website.

3. Engage a coach as an independent contractor

"Try out" a coach by working with them as independent contractors. Create an independent contractor agreement stating that you're engaging with the coach to deliver services to your patients. **This may consist of the following:**

- **Package of sessions (typically 8-10)**
- **Services delivered either in-person or remotely**
- **Services delivered either 1:1 or in a group format**

For example, you could contract with a health coach to run a group program, such as a meditation group or a group for patients with type 2 diabetes.

It's important to verify the particular requirements for classifying a worker as an independent contractor rather than a salaried employee.

4. Hire a coach full or part-time.

Depending upon the size of your practice, consider having a coach on salary, either full or part-time. Pay scales vary widely and take into account the experience of the coach, the responsibilities they will be given, the geographic area where you practice, and the population that you serve.



What Should I Look for When Hiring a Coach

First and foremost, find a coach who shares your values, your vision and your mission. They view the practice as their business.

Engage with a coach who shares your speciality and enjoys working with the types of patients you treat. Work with a coach who is comfortable with your preferred way of seeing patients, such as remotely or in groups.

Bring on a coach who is fully committed to growing the practice with you.

Ensure that they have qualified from a reputable program, such as FMCA. Hire a coach who is fully insured, and is either a Professional Member of the Health Coaches Australia & New Zealand Association (HCANZA) or who is certified through the NBHWC (National Board for Health and Wellness Coaching) based in the USA.

The ability for a Practice to be reimbursed for appropriately qualified health and wellness coaches by governments within Australia & New Zealand is evolving. Some reimbursements and resources are available to practices depending on where you practice and your patient profiles. This is especially true in underserved communities.

What about Legal Compliance and Ethical Considerations?

For coaches working as employees in your Clinic?

As an employee, a health and wellness coach is subject to ALL the regulations and compliance issues as any other member of your team.

For coaches working as consultants in your Clinic?

As a consultant working with patients referred by you and or other practitioners in your clinic, they are subject to, and must comply with ALL of the legal and health regulatory compliance requirements in regard and not limited to informed consent, client confidentiality, privacy, record keeping, mandatory reporting etc.

Should coaches be listed on my malpractice insurances, and other clinic and workplace insurances?

Best practice would be to list the coach on your insurance coverage where required, just as you would for any other member of your team.

It's also prudent to expect the coach to carry their own liability insurance coverage and share a copy with you to verify that it's current if they are consulting to your practice.



How Can Coaches be an Income Stream for the Practice?



Many practitioners mistakenly believe that adding a health coach to their team amounts to a financial drain on the practice. In fact, coaches can be an added source of revenue.

One popular option consists of paying the coach a percentage of the revenue collected by the practice for their specific service. The coach gets paid when the business gets paid.

Create an agreement that incentivises the coach to grow the practice with you. The standard is 40% or 50% of the revenue generated for their direct services. Then, as they exceed expectations, such as bringing in new patients and documenting positive changes in the patients they work with, increase the percentage. As the practice grows, they could even hire and manage additional coaches.

Coaches add value through “secondary skills”

In addition to helping patients thrive, health coaches can benefit the practice by bringing in “secondary” skills. These may include building a social media presence, developing online courses, creating blogs or offering community presentations.



Is There Research about the Effectiveness of Coaching?

The answer to this question is a resounding yes. FMCA conducted a pilot study a few years ago, and found that on several markers, there were improvements in both physical and emotional health in as little as five coaching sessions.

The following listing highlights some of the investigations into the efficacy of health coaching:

Perlman, Adam and Abd Moain Abu Dabrh. Health and Wellness Coaching in Serving the Needs of Today's Patients: A Primer for Healthcare Professionals. *Global Advances in Health and Medicine* 2020 Sept; 9:1–8.

Lacagnina, S, et al., (2018). The Lifestyle Medicine Team: Healthcare That Delivers Value. *Am J Lifestyle Med.* 12(6):479-483.

Boehmer, K, et al., (2019). Capacity Coaching: A New Strategy for Coaching Patients Living with Multimorbidity and Organizing their Care. *Mayo Clin Proc.* 94(2):278-286.

Wolever RQ, Simmons LA, Sforzo GA, et al. A systematic review of the literature on health and wellness coaching: defining a key behavioral intervention in healthcare. *Glob Adv Health Med.* 2013;2(4):38–57.

Dyrbye LN, Shanafelt TD, Gill PR, Satele DV, West CP. Effect of a professional coaching intervention on the well-being and distress of physicians: a pilot randomized clinical trial. *JAMA Intern Med.* 2019;179(10):1406–1414.

Health and wellness coaching positively impacts individuals with chronic pain and pain-related interference – July 2020 Article in the Plos-One Journal Compendium of Health and Wellness Coaching – May 2019 Article in the American Journal of Lifestyle Medicine.

<http://medicaleconomics.modernmedicine.com/medicaleconomics/content/tags/licensure/delegating-tasks-practice-staffenhances-team-based-care>

Can Doctor's Become Health Coaches?



“I’d like to continue my work as a practitioner and also facilitate online groups as a health coach.”

“I’m retiring from the practice of medicine, but want to stay involved in healthcare because I have a strong mission to serve.”

“I want to learn the coach approach to be more effective with my patients.”

You don’t need to choose between being a practitioner and a coach.

Increasing numbers of healthcare practitioners, including physicians, are choosing to pursue training in health and wellness coaching.

Consider three models:

Integrate the coach approach within your existing practice.

By blending strategies such as openended questioning and appreciative inquiry, you’ll enhance the therapeutic alliance. Not only will your patients benefit, there’s a high likelihood that you’ll experience more satisfaction in your work and re-discover why you chose to practice medicine.

Keep your existing practice and add a dedicated coaching business.

In this model, you're switching hats. Maintain your professional license and continue to see patients. Simultaneously, establish a coaching business as a certified health coach. The key to creating dual roles is being crystal clear on exactly what constitutes each position.

Draw up a client agreement that spells out exactly what constitutes a coaching relationship. Specify that you're a licensed practitioner, but that you're contracting with them as a health coach. You will not be diagnosing or treating any medical condition. Make sure that both you and the client sign the agreement.

Maintain strict boundaries. This may mean having separate coaching clients and not coaching existing patients. If the need arises, refer those clients to medical colleagues. In other words, you're not switching hats for any given individual.

To avoid confusion, don't act like a medical practitioner when you're coaching. It's easy to slip into the expert role. To further establish boundaries, always refer to those you coach as "clients" and those you treat in your medical practice as "patients." Rather than referring to yourself as "Dr." have coaching clients address you by your first name.

It's important to bear in mind that in the event of a lawsuit or professional regulation complaint, you will still be held to your highest license.

Give up your existing practice and become a full-time health coach.

An increasing number of healthcare professionals describe feeling burned-out and exhausted. Many see themselves as data entry clerks and slaves to the electronic medical record system. Some may be frustrated by their particular licensing restrictions. Others are nearing retirement but want to continue to serve the needs of others.

Health coaching offers a path to pursuing a career that's aligned with your meaning and purpose.



training

Conclusion

I envision a healthcare ecosystem where health coaches as behaviour change specialists are important members of collaborative care teams, and they're found in every medical office. That day may not be far off, as the demand for health coaches is rapidly exploding.

Looking ahead to the future of healthcare, one of the solutions for reducing the epidemic of chronic illness and increasing access to affordable care lies in the creation of a culture of belonging: a model where the existing hierarchical structure gives way to true collaborative care. Imagine a team consisting of the doctor, the nurse, the health coach, and most importantly, the patient. Add in a mental health professional, a nutritionist, a physical or occupational therapist, and other ancillary providers as needed. All voices are heard and respected, the physician re-connects with their "why" for entering the field of medicine, and the patient feels empowered to take charge of their health.

"It really is a tremendous added benefit. I would never go back to not having a coach."

DR. MAX TOMLINSON

"I made the decision and leapt out there and got myself a health coach and it changed everything!"

"You have to have somebody with a background in behavioural change, because if you don't, it's negligence to your patients."

DR. JABE BROWN

DR. COREY RICE

"Health coaching is growing tremendously. Insurance companies are using them, corporations are using them, hospitals are starting to use them. In Functional Medicine, there's no way we can do what we do without health coaches. It's going to be the future of how we actually create a successful, financially stable and clinically effective healthcare system. I think it's an awesome moment in healthcare and we're just at the beginning of a transformation in the health coach movement, and particularly Functional Medicine health coaches. They're going to be critical for the future of healthcare."

DR. MARK HYMAN

About the author



DR. SANDRA SCHEINBAUM is the founder and CEO of the Functional Medicine Coaching Academy. An Institute for Functional Medicine Certified Practitioner and clinical psychologist with a Masters degree in learning disabilities, Dr. Scheinbaum specialized in blending mind-body medicine with positive psychology and taught stress management to both children and adults for over 40 years. She established a clinic for diagnosing and treating attention deficit disorders and also ran a clinic for treating panic and anxiety. Dr. Scheinbaum was a board-certified senior fellow in biofeedback, certified health coach, and registered yoga instructor and taught classes at National Lewis University and the University of Western States. She is the author of *Functional Medicine Coaching: How to Be Part of the Movement That's Transforming Healthcare*, *Stop Panic Attacks in 10 Easy Steps: Using Functional Medicine to Calm Your Mind and Body with Drug-Free Techniques*, and *How to Give Clients the Skills to Stop Panic Attacks*, and conducted one of the first controlled studies of neurofeedback for the treatment of ADD.

About HCANZA



Health Coaches Australia & New Zealand Association (HCANZA) is the industry body representing professional health coaches across Australia and New Zealand.

HCANZA is committed to recognising and upholding fundamental elements for a credible industry standard that consists of:

- science-based core competencies and curriculum that are well defined and ethical,
- appropriately trained and skilled faculty teaching those programs,
- graduate certification credentials that signify professional standing,
- accountability through the commitment to industry Scope of Practice and Code of Ethics,
- external verification of the quality of specific programs.