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## Life Coaching: Possibilities for Occupational Therapy Practice

Amy L. Heinz  
*St. Catherine University*

Karen McCarthy  
*University of Southern California, karen.mccarthy@dominican.edu*

Wendy Pentland  
*Queen's University - Kingston, Ontario*

Camille M. Dieterle  
*University of Southern California*

Jennie M. Antolak  
*Learning Journeys International Center for Coaching*

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## **PART I**

Life Coaching:  
Possibilities for Occupational Therapy Practice  
AOTA 2010 Orlando, FL

- Amy Heinz, MA, OTR/L, CLCP
- Camille Deiterle, OTD, OTR/L
- Karen McNulty, OTD, OTR/L
- Wendy Pentland, OT (Reg) Med, CPC, PhD.
- Jennie Antolak, MA, MCLC

What is the “so what”?

- Why are we here?  
What is coaching?
- Coaching is conversation-based relationship focused on assisting clients to move from their current state to a more desired future state.  
What is Coaching?

### ***It is NOT...***

- Expert, advise, counsel
- Analyze, judge, fix
- Past focus
- Drive, recommend
- Helping

### ***It is...***

- Partner relationship
- Accept, move, invent
- Present and future focus
- Focus, pace
- Championing, challenging, accountability
- What is Coaching?
- Collaborative relationship
- Focus on goal attainment
- Personal growth
- Client directed

### Professional Coaching Approach

- The coach facilitates clients in:
  - recognizing their beliefs and assumptions about who they are in the world
  - expanding their options
  - choosing and making desired life changes
- A process that occurs over time
- Grounded in self-assessment
- An appreciative approach

### Theoretical Underpinnings

- Human development (differentiation)

- Psychology (Adler, Jung, Frankl, Prochaska, Hayes)
- Positive psychology (Seligman, Peterson, Csikszentmihalyi)
- Appreciative Inquiry (Cooper-rider et al)
- Philosophy/Spirituality
- Learning theory (Transformational Learning- Mezirow; Action-Reflection Learning- Schon)

#### How Coaching Works

- Listening at a deeper level
- Intuition
- Curiosity

#### How Coaching Works

- Forward and deepen
  - Self management

#### Coaching Process

- Telephone
- Face to face
- Electronically
- Hybrid of the above

#### Coaching Process

- 1:1 or group format
- Typical session: 30-60 minutes, 3 times per month
- Homework between sessions
- Duration: 3-6 months

#### Coaching Clients

- Individuals going thru transitions: job change, retirement, etc.
- Individuals who are discontent or feel that something is “missing” in their lives
- Individuals who are having difficulty balancing roles and responsibilities

#### Training

- Professional coaching is an unregulated profession
- International Coach Federation (ICF)
  - Accredits courses and training programs
  - Offers coach certification at 3 levels

#### **Examples:**

- Adler International Learning (formerly Adler School of Professional Coaching)
- Learning Journey’s International Center for Coaching
- Dave Ellis Leadership and Coach Training
- Shifts in Healthcare
- Focused area→→ Holistic
- Weaknesses→→ Strengths
- Prescribe & treat→→ Partner and solve
- Reactive→→ Proactive
- Coaching in Healthcare
- Persons with heart disease (Vale, Jelinek, Best & Santamaria, 2002; Vale et al, 2003)

- HIV aids (Garfinkel & Blumenthal, 2001)
- Addictions (Shafer, Kiebzak & Dvoskin, 2003)
- Families in crisis (McGoldrick & Carter, 2001)
- Diabetes (Joseph, Griffin, Hall & Sullivan, 2001)
- Obstetrics (Hadikin, 2001)
- Older adults (Holland et al 2003; Lynch et al, 2003)
- New immigrants/health promotion (Irwin & Morrow, 2001)
- Stressed workers (Yen et al, 2001)
- Mildly depressed women (Pechinik, 2003)

Life Coaching- A Role for Occupational Therapy

*I remember the first time I heard of coaching, I thought what a great description of OT.*

—Jane Sorensen, PhD, OTR, ND

OT and coaching— a natural fit

- Philosophy
  - Holistic
  - Emphasis on wellbeing
  - Client centered/allows choice
  - Focus on what is meaningful and satisfying
- Training
- Psychosocial
- Human development
- Assessment and observation
- Goal setting
- Therapeutic use of self

- Life Coaching- A Role for Occupational Therapy

*A therapist can incorporate coaching skills into a current OT practice, or a therapist can develop a private coaching practice. Skills specific to coaching can be mastered and incorporated into any OT practice.*

—Jane R. Yousley, OTR/L

Example scenarios where coaching could be used in OT:

- Community-based care
- Health promotion/Wellness
- Life transitions
- Acute care
- Palliative care
- Anxiety/depression
- Return to work/vocational rehabilitation

Example OT coaching program— Positive Self Image Life Coaching Program

*Helping our clients identify what is of value to them, setting goals, breaking down tasks into measurable steps, and empowering our clients to take the action necessary to achieve their goals are core OT skills. These same skills are required for life coaching.*

—Bobbi Jean Tanberg, COTA/C

Brachtesende, A. (2005, May 23). Life goals don't have to end with injuries.

*OT Practice*,10(9), 7-8.

Example OT coaching program– Positive Self Image Life Coaching Program

**Outcomes:**

- Driver's license
- Return to college
- Reports of increased self esteem
- Increased socialization
- Decreased use of antidepressants

Life Coaching- A Role for Occupational Therapy

- Canadian Association of Occupational Therapists (CAOT) : Formally adopted coaching as an enablement skill.
- Australian Association of Occupational Therapists (AAOT): Lists coaching as an emerging area of practice for OT.
- OT coaches website: [www.occupationaltherapycoaching.com](http://www.occupationaltherapycoaching.com)

*We have more possibilities available in each moment than we realize.*

–Thich Nhat Hanh

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# Life Coaching:



## POSSIBILITIES FOR OCCUPATIONAL THERAPY PRACTICE (TOOLS)

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## Creating Trust Model

Who are the people in your life at the highest level of trust?

What did it take to get there with them?

Who are at the lower end of the model?

What causes them to hang out there?

How will you utilize the trust model when working with clients?

What do you believe will shift and change if you pay closer attention to these areas?

**Commitment and Assured Trust**  
(willing to stand for one another and take large risks)

**Soulful Nourishment**  
(richness is felt each time there is a connection)

**Creative Expression and Authenticity**  
(expansion of thoughts and ideas occur due to authenticity)

**Shared Stories**  
(willing to connect through stories)

**Courtesy**  
(willing to be nice but no sense of commitment)

**Awareness/Avoidance**  
(aware of them but have no relationship)





### SELF

What do you still need to know/learn?

What do you need to let go of?

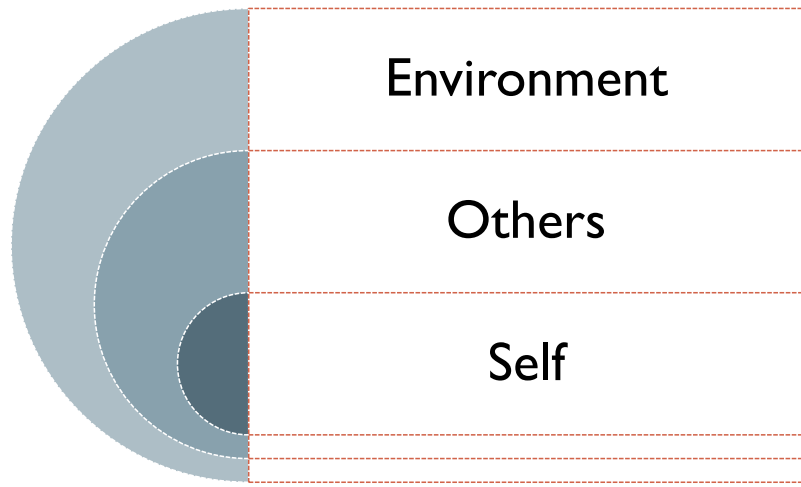
### OTHERS

Who do you need to prepare? How?

### WORLD/ ENVIRONMENT

What will support you in your environment?

What will distract you?



## Circle of Support



•WHAT?

•WHEN?

•HOW?

•NO WHY

**Intention**

What is it you want?

When you get what you want what will you have?

What difference will it make?

**Self**

What is really important to you? (What are your values?)

How does this change align with what you value?

What would enhance if you made this change?

**Others**

Who are your supporters? Who will take a stand for you and help you along the way?

What help are you willing to accept from others?

**Environment**

How does your environment support you today?

What could you shift and change?

What structures could you put in place to remind you of your goals?

## **PART III**

### **Incorporating Life Coaching into OT Wellness & Prevention Services**

Camille Dieterle, OTD, OTR/L

Karen McNulty, OTD, OTR/L

- Wellness and Prevention

Occupational Therapy Treatment can:

- Prevent disease, disability and chronic conditions
- Better manage disease, disability and chronic conditions through wellness tools

- USC Occupational Therapy

Faculty Practice

- Outpatient Clinic
- Prevention and Wellness Services
- Lifestyle Redesign<sup>®</sup> approach
- Clients:
  - Adults
  - Pediatric/Family Weight Management

- Current Services at USC OT Faculty Practice

- Weight Management
- Diabetes Management
- Pain management
- Chronic headaches
- College Student
- Lifestyle Components
  - Daily Habits & Routines
  - Time Management
  - Physical activity
  - Stress Management, Relaxation & Sleep
  - Nutrition and Eating Routines
  - Meaningful Activities
  - Social Relationships, Support, & Community
  - Pleasure, Play & Leisure
  - Spirituality
  - Pacing & Energy Conservation
  - Personal Motivation and Habit Change
  - Roles and their impact on daily routines
  - Attitude and Mood

- Additional Client Factors relevant to lifestyle:
- Presence of chronic condition(s)
- Increased risk factors for chronic condition(s)
- Occupational role overload
- Occupational deprivation

- Common Diagnoses and Chronic Conditions
  - Overweight/obesity
  - Diabetes
  - Heart disease
  - Coronary Heart Disease (CHD)/Coronary Artery Disease (CAD)
  - Diabetes, pre-diabetes, at-risk
  - Glucose intolerance
  - Hypercholesterolemia
  - Hypertension
  - Candidates for bariatric surgery
  - Joint pain
  - Sleep apnea
  - Thyroid issues
  - Stroke
  - Arthritis
  - Chronic Fatigue
  - COPD
- Common Diagnoses and Chronic Conditions
  - Mental Health Issues
  - Depression & Anxiety
  - Chronic Stress
  - Multiple Sclerosis
  - Parkinson’s Disease
  - Repetitive Stress Disorder
  - ADD/ADHD
  - Chronic Pain
  - Back & Neck pain
  - Chronic Headaches and Migraines
  - RSD
  - Fibromyalgia
  - Eating Disorders
  - Poverty and violence
  - Difficulty adjusting to college role
  - Learning disabilities
  - ADD, ADHD
  - Mental health diagnoses
  - Acute reactions to stress
- Format

**Group sessions**

- Once/week
- 60 minutes
- 16 weeks

**Individual sessions**

- Once/week
- 30–60minutes
- 16 weeks

- Reimbursement
- Bill PPO's and Medicare with OT codes:
  - Eval
  - Therapeutic group
  - Functional therapeutic activity
  - ADL's
  - Therapeutic exercise
    - Some Dx not currently covered: obesity
  - Reimbursement
- Contracts
  - USC Network
  - Motion Picture Television Fund
- Private Pay
- Grant funding
  - Good Neighbors Grant
- Program Description
- **Population:** College students (undergraduate & graduate)
  - Common diagnoses: Depression, Bipolar Disorder, Anxiety, ADD/ADHD, and various learning disabilities
- **Program:** The Lifestyle Redesign<sup>®</sup> for the College Student provides individualized support and coaching throughout the year to help manage the demands of college life.
  - Services provided in **environment** of the student
  - **Who can benefit from the Lifestyle Redesign<sup>®</sup> Program?**
  - Program Description
  - **Occupational Therapists help students:**
    - **Optimize study/work environments**
    - **Increase organizational skills**
    - **Improve time management**
    - **Increase focus**
    - **Learn techniques to handle stress**
    - **Manage money effectively**
    - **Access community transportation**
    - **Goal setting**
    - **Nutrition & Exercise**
    - **Create a balanced lifestyle!**
- Program Strengths

### **Strengths**

- Location
- Support of Disabilities and Services Programs
- Student health insurance
- OT faculty support
- Unique service on campus
- Program Barriers & Strategies

- | <b>Barriers</b>  | <b>Strategies</b>          |
|--|----------------------------|
| • Decreased visibility on campus                         | Marketing Plan             |
| • Decreased knowledge of OT                              | Consumer Friendly Language |
| • Physician referral required with doctors/psychologists | Strengthen Relationship    |
- Marketing Plan
  - **Centennial Vision** Statement: “By the year 2017, we envision that occupational therapy is a powerful, **widely recognized**, science-driven, and evidence-based profession with a globally connected and diverse workforce meeting society’s occupational needs.
  - **How do you market an OT life coaching program in an environment not familiar with OT?**
  - Widely recognized:  
Using Consumer Friendly Language
  - Alternative ways to describe OT:
    - Life design
    - Life coaching
    - Transition coach
    - “Doing” Therapy
    - Architects of life
    - Community Reintegration Specialists

- Life Coaching

Develop and implement a plan that helps you reach your goals, enhance your sense of well-being, and decrease negative aspects of stress.

Skills your occupational therapist life coach can help you cultivate:

- Being accountable to yourself
- Motivation
- Devising effective problem solving strategies
- Creative thinking
- Goal setting
- Achieving the goals you set
- Being action-oriented
- Decision-making
- Marketing Strategies
- In-services & Presentations
- Academic Classes
- Trainings
- Workshops
- Participation in Case Conference Meetings
- Forming Student Club
- “Tabling”
- Relationships with Physicians and other Referrers
- Wellness Walkers
- Marketing Strategies

- Fliers/ Brochures
- Email/ E-newsletters
- Website/ facebook
- You tube videos
- Project Lifestyle: Trojans for Healthy Living
- Facebook Page
- 

### **Life Coaching for Students**

#### **Successfully Transition to College Life!**

#### ***Our life designers help students:***

- **Improve time management**
- **Increase organizational skills**
- **Manage Stress**
- **Create a balanced lifestyle**

### **USC Occupational Therapy Faculty Practice & Center for Academic Support**

**[www.usc.edu/otfp](http://www.usc.edu/otfp)**

**(Lifestyle Redesign<sup>®</sup> for the College Student)**

**Phone: 323.442.3340**

**[kmcnulty@usc.edu](mailto:kmcnulty@usc.edu)**

**Contact: Karen McNulty, OTR/L**

- Your Market
- Who?
  - What is the population you are trying to reach?
- Where?
  - Where are these clients?
- What?
  - What are the lifestyle concerns that they have?
  - What do they want out of life coaching?
- Case Study
- Client: Peter

undergraduate transfer student from Hungary

- Presenting concerns:
  - Time management – tardiness and procrastination
  - Stress Management
  - Decreased social involvement
  - Poor study skills
- Case Study
- OT treatment approach
  - Breaking down tasks, planning
  - Learning new stress management/ relaxation techniques
  - Identifying learning styles, optimizing study environment
  - Exploring new occupations in LA
  - Dating coaching
  - Case Study

- Outcomes:
  - Improved time management
  - Increased engagement in new occupations leading to increased social networks
  - Improved self esteem

- Coaching: Weight Management

Client: Diana

58 yr old female with Dx of obesity, diabetes

- Presenting Concerns:
  - Diabetes/Blood sugar escalating
  - Gaining weight from increased insulin
  - Fatigue
  - Increased stress at work
  - Excessive caffeine consumption:

6-8 sodas per day

- Coaching: Weight Management

OT Treatment Approach:

- Prioritizing her own well-being
- Planning for healthy eating
- Consistent physical activity
- Self-esteem
- Happiness in daily routines and activities
- Managing stress and relaxation techniques
- Finding “healthy pleasures” to substitute for caloric rewards
- Time Management - especially while at work
- Coaching: Weight Management

Outcomes:

- Went completely off insulin after 25 weeks of Tx
- Stopped weight gain: Lost 2 lbs overall and 5 of fat mass
- Exercises 5/7 days/ week
- “I feel great! I have so much more energy now”
- Reduced caffeine consumption by 75%
- Happier at work
- Reports improved stress management
- 

Group coaching for individuals living with multiple sclerosis

- International Journal of MS Care article– Group Coaching: Expanding Possibilities for Individuals with Multiple Sclerosis
- Sponsored by the MN Chapter of the National MS Society
- Coaching: Learning Journey’s International Center of Coaching and St. Catherine University OSOT department
- Curriculum: Just for Me (JFM) Wellness
- Participants: female, 35-60 y/o, living independently



Group coaching for individuals living with multiple sclerosis

**Outcomes**

- Themes:
  - Participants believed that the coaching tools learned would help them decrease stress and increase life balance in the future
  - Participants felt they had enhanced awareness and perspective about their lives; able to see possibilities, and clarify what really matters.
  - Participants valued the importance of setting and having goals
  - Individuals reported increased or improved:
    - family relationships
    - motivation
    - ambition
    - self esteem
    - attitude
    - time management and organization
    - ability to see opportunities
    -

Group coaching for individuals living with multiple sclerosis

- Accomplishments:
  - Scheduling a vacation
  - Making diet changes
  - Coming to the class alone
  - Joining a support group
  - Networking and relationships
- Future considerations
  - Program length
  - Clarity of materials to address cognitive issues
  - Allow adequate discussion time
  - Be flexible
  - Community partnerships are important
  - Consider accessibility

The Soul of Resilience: Strengthening students' ability to deal with stress through life coaching

- Funding: American College Health Foundation grant
- Coaching: Learning Journey's International Center of Coaching and St. Catherine University OSOT department
- Collaborative approach:
  - Health and Wellness Center
  - Exercise Science
  - OSOT
  - Campus Ministry
  - Counseling Center
  - Residential Life
  - Curriculum: JFM Wellness

The Soul of Resilience: Strengthening students' ability to deal with stress through life coaching

- Participants:
  - female, living on campus, various academic levels
  - Outcomes: PSS, HPLP II, JFM
  - 4/5 students indicated decreased stress, increased health promoting behaviors, and increased wellness satisfaction scores
  - I haven't blushed once this semester; I am more comfortable with myself
  - I am more thoughtful; I believe I can do this; I just need to take things step by step
  - I feel lighter-more free
  
- Questions? Comments?
- Amy Heinz; [alheinz@stkate.edu](mailto:alheinz@stkate.edu)
- Jennie Antolak; [jgodlak@earthlink.net](mailto:jgodlak@earthlink.net)
- Camille Dieterle; [dieterle@usc.edu](mailto:dieterle@usc.edu)
- Karen McNulty; [kmcnulty@usc.edu](mailto:kmcnulty@usc.edu)

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**Recommended Readings/Resources:**

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