# Certification Program Leader's Manual

Welcome to the Certification Program Leader's Manual. This introduction is divided into five sections:

1. Overall Program
2. Starting Powerfully
3. Program Components
4. Tips for Effective Leadership
5. Policies/Procedures

Please read over the whole thing as it is updated frequently. Updates will be noted by version number and date.

# The Certification Program Overall

### *Arcs and Threads of the Program*

The outcome of the Certification Program is that students will fully integrate the competencies of the Co-Active® Model and the profession and to be well on the road to mastery.

Each Pod Call has its own specific arc and outcome. As CPL, you are holding the arc of the call and of each section of the call, while balancing aliveness, learning and rigor.

Threads to hold throughout the Certification Program:

- *Integration.* As CPL, you are looking for ways to integrate different aspects of the model, and to integrate the “co” and “active” as well.
- *Embodiment.* A key to becoming a masterful co-active coach is getting the model and related behaviors into the coach’s being. As CPL, you are modeling this, and continually working with your Pod members to embody what they are learning.
- *Learning Laboratory.* Keep the energy of experimentation and the space of a learning laboratory, full of trial and error, mistakes and celebrations. As CPL, you model this throughout the Program.

What is different about leading phone courses and in-person courses?

- You are leading alone and this means that you have to hold and balance the roles of Trainer, Coach, and Colleague.
- During the coaching exercises, the client is not a trained leader who is also holding the learning with you. In the Angel on the Shoulder Tips below, we give you some ideas for working with this.

### *Client Requirements and Client Game*

Students are required to have five clients no later than Week 3 of the Program (Pod Call #02).

The Client Game is an optional way to help students get clients for Certification. The goals are: 1. to take getting clients less seriously, 2: to have fun, and 3: to support the students in getting at least five practice clients.

This is held in the context of “Going for practicing fully rather than filling your practice.” All graduate programs and internships require practice and no other profession expects you to get rich in your practicum period.

The game holds that eight clients are needed to reach roughly 100 coaching hours in six months. Five clients is the requirement. The Orientation Call speaks about this.

The Client Game begins 2-3 weeks before the first Pod Call.

The Client Game has 3 live calls, which are also recorded, and web support.

- *Client Game Call #1:* Step into FUN perspective. Lots of emails are sent by leaders to keep the energy high. Each student comes to the call with names of five people they will recruit and two people to give away in the "client swap."

- *Client Game Call #2:* Information on Sample Sessions and website use (clients to swap are on the website). There is a new area on the website each month for each group of students going through the Program. There are lots of resources there to help students.
- *Client Game Call #3:* Check-in and some work on geography and life purpose to support getting clients.

Role of CPL in the Client Game:

- Know this support is available and that your students may be playing this game.
- When you send a Welcome letter to students, remind them about the Client Game (they will be automatically enrolled in the Game when they get assigned a Certification Pod and will have received a letter from CTI about it).
- The Client Game begins 2-3 weeks before the first Pod Call. The calls may be attended in person or listened to on the web.

### *Certification Program Specialist (CPS)*

Role of CPS at CTI:

- The CPS will send the students blank rosters, via email, one week before the rosters are due and will track them as they come in.
- The student must send their roster of five clients to the CPS at CTI by the time of their second Pod call (Week 3 of Certification) and also let their CPL know their client status.
- If the student does not have five clients by the third week of the Program, but has at least three of five clients, the CPS will give the student up to two additional weeks to get their additional clients.
- If the student has less than three clients, at this time, they will be asked to leave the Program by the CPS.
- The CPS will email the CPL an update of the status of their Pod members, after the roster due date for their Pod.

*CPL's please note:* The students do not know there is a two-week extension possibility. Be aware that the longer the student waits to leave the Program, the less refund they receive.

### *Orientation Call*

There is an Orientation Call to get students anchored in the particles of the Certification Program. This call is NOT led by you the CPL, but will be one call for all students beginning Certification in any given month. They are required to attend the call or listen to the recording of the call before they attend their first Pod Call. There is a Timeline of this call in Section 2 of this Manual for your information.

### *Pod Calls*

There are 13 Pod Calls led by you. The details and logistics of the program are covered in the Orientation Call. The topic of the first Pod Call that you lead is Empowered Relationships. Students will learn about creating empowered relationships first and foremost with their clients, and also with the Certification Program, with their CPL and Supervisors, with each other, and with their journey.

Pod calls cover the Cornerstones, Principles, Contexts and skills of the model. The final call is about the skill of Completion and is a space for them to complete as a Pod. These calls include a mix of skill drill practice, coaching demonstrations by the CPL, mini-visualizations and discussion.

### *Mid-Program Review*

The Mid-Program Review is for the student to look at their progress with their CPL, and discuss what they might want to change, focus on, or improve for the remainder of the Program. The Mid-Program Review must be done by Week 17. This means that you can have your Mid-Program Reviews spread out over a few weeks.

### *Exam*

The final exam is in two parts, written and oral. You will email the Written Exam to each student in your Pod after your Pod Call in Week 23. Students will have until Week 25 to send it back to YOU and you will grade it.

You will have two weeks after the last Pod Call to return the graded exams to CTI. Results will be mailed to the student from the CTI office. If the student fails the written exam, you will do an exam review with them. See Policies/Procedures for more details.

The Oral Exam takes place on the telephone. Students may sign up for the Oral Exam after they have logged 70 hours of coaching and completed their Mid-Program Review. The earliest that students may take their Oral Exam is four weeks after completing their last Pod Call, submitting their Written Exam, and turning in all required documentation to CTI. Refer students to the Oral Exam prep call for more information.

The CPL will interact with the student until the student passes both portions of the CPCC exam.

# Starting Powerfully

### *Before the Pod Starts*

- Initial contact with your Pod. We recommend that you call each of your students before the Program begins (this is not required). This can be a very short call, just welcoming them to the Program and finding out a bit about them. Often you can just leave them a message, welcoming them, with no need to call you back unless they have specific questions. If you do this, you get a sense of who they are, and they feel more at ease coming to the first call. Students may or may not have listened to the Orientation call when you contact them; if they have a lot of questions, refer them to the call rather than spend a lot of time answering them.
- Announcements. Send your Pod a "getting started" announcement through the CPCC website welcoming them to the Program. It should include a welcome, and a reminder to do the preparation for the first Pod Call. Note: Use the "Force Send" setting in the CPCC website to be sure students receive the announcement in external email.

### *CPL Timelines and Role*

CPL Timelines include the Timeline for the call and a Resources section at the end of each Timeline. Timelines include Learning Objectives for the call, Key Learning Points, and Notes for you, the CPL. The Resources section includes glossary definitions for the topic of the call and the skills used in the call. The Timeline assumes that the learning has been landed from the last Module.

*Read the Timeline thoroughly prior to each of the Pod Calls*, and know what topics come before and after the week you are working in; this will help establish the context of where the students are in the Program and in their learning. Please be familiar with the content in the CPCC Manual and the Module audios for the week the coaches are in as well.

Your primary job is to create learning on the Pod Calls. The Timelines are created so that you have a format in which to create learning. Yet, it is more important that you create learning than stick to this Timeline exactly. You have the permission and responsibility to shift/go off the Timeline when it is necessary to create more powerful learning. When you do go off Timeline, we know you can and trust that you will integrate whatever may have been side-stepped into future calls. We want you to balance consistency of the Program with your ability to create from nothing and everything.

Some specifics about your role:

- Find the students right, reaffirm content or coach's intent, redirect the learning and hold everyone naturally creative, resourceful and whole.
- Be transparent as teacher and leader. Let them know what you are doing as a leader, and be vulnerable about your own learning as a coach.
- You are the students' guide and trainer. This is the students' Program, and your job is to serve their learning as trainer, coach and colleague. All of these roles need to be present.

- Call the students into more rigor with stronger and more specific feedback.

Assume they come to calls ready to go, and train that readiness as a coaching skill. They show up on their coaching calls completely ready for their clients. Let's expect the same with these calls and set that up in the Designed Alliance.

### *Creating a Strong and Dynamic Pod*

Here are some tips to creating a strong and dynamic Pod:

- *Include everyone.* Pay attention to the introverts and draw them out. Occasionally, ask a question and give them time to come up with an answer before you call on them. Tell them that you assume their hands are raised all the time, ready to participate.
- *Model Co-Activity.* Keep the Model in mind. What Cornerstones and Contexts do you need to pay attention to? How much are you continually designing and empowering the relationship between you and your coaches? How can you point to your own modeling as a source of learning for the whole Pod? Or reach for the Model when there's a challenge in a Pod?
- *Step over nothing.* Lean into the Model and redesign your alliance often and as needed. Call them powerfully into the learning community/learning laboratory. Interact with them as though they have taken Synergy.
- *Remember Safe and Courageous Space and especially do what needs to be done to build the courageous space.* Offer rigorous feedback. Don't tell them they did well when they didn't. Don't use "Nobody gets to be wrong" to mean "everyone has to feel good." There are incorrect answers sometimes and not all coaching is "great."
- *Your job is to both build confidence and give straightforward feedback.* Find your dance between these.
- *Your goal is to help the students have an "abundance of each other," instead of having them rely on the CPL for all the answers.* It is not about a "scarcity of the CPL," but about having them lean on each other to create deeper community. Be transparent about this with your Pod.
- *Cultural effectiveness and orientation*:
  — The students were told on the Orientation Call: "Some of you may only speak English. Others may speak English as a second language. With diverse language abilities, cultural orientations (geographic and organizational) you may find that your dialogues are filled with accents, intonations, references, and underlying beliefs… How can you use that to deepen your learning about being a coach?"

  — As a CPL, you need to address cultural and language issues directly with the whole Pod and often, especially when there are Pod members who are not native-English speakers. Design alliances with this in mind.

  — Be clear that the focus is on the learning and that you won't sacrifice the learning for one person AND you will not sacrifice the one person either.
- *Use the skill of Articulating What's Going On liberally.* Name what is in the space and assume you have a strong enough

alliance to deal with it effectively. Lean into the Model and articulate with curiosity, holding yourself and the students naturally creative, resourceful and whole.

# Program Components

### *CPCC Manual*

Read the CPCC Manual thoroughly. Be sure to read *Section 1: Introduction and Orientation* before your first Pod Call. Familiarize yourself with the Supervision Review forms and Glossary.

### *Topic Module Activities: Students*

There are several different activities that students complete for each Topic Module:

1. *Practice*. Specific assignments that have them practice the skills with their clients over the entire two weeks of the Topic Module.
2. *Preparation*. Reading, listening to Module Audios.
3. *Attend Pod Call/*
4. *Post*. Post answers to homework questions in your Pod-specific Module area on the CPCC website.
5. *Discuss*. Discuss the homework and their learning with their Podmates in your Pod-specific Topic Module area on the CPCC website.
6. *Attend Triad Call/*
7. *Track*. Stats are recorded by students after each Topic Module on the CPCC website. This makes it easy for you to interact with students about stats when you respond to homework.

### *Triad and Group Supervision Calls*

There are 12 Triad Calls. The first three are Group Supervision Calls and the remaining nine are Triad Calls. The participants will stay in the same group for the 3 Group Supervision Calls and those will be led by one assigned Supervisor. The Triad Calls are student led and the groupings change according to the formula you will find below.

### *Setting Up Group Supervision and Triad Calls*

***Step 1*:** Review the Group Supervision assignment sheet for the Pod to ascertain which participant is #1, 2, 3, etc. Those participants are pre-assigned and will continue to be associated with that pre-assigned number as you apply the formula below. (For example, if John Smith is #1 in the Group Supervision Call assignment from the Pod Welcome Packet, John Smith will continue to be number 1 throughout the formula below):

***Step 2*:** Apply the following formula for setting up the Group Supervision and Triad Call groupings by week. You can set up triads for the whole Program and send them out with the Intro/Welcome email. Students need no more interaction around triad scheduling if you do this.

- Week #02 Triad Grouping #1: 123-456-789 (Group Supervision and already assigned)
- Week #04 Triad Grouping #1: 123-456-789 (Group Supervision)

- Week #06 Triad Grouping #1: 123-456-789 (Group Supervision)
- Week #08 Triad Grouping #2: 147 — 258 — 369
- Week #10 Triad Grouping #3: 159 — 267 — 348
- Week #12 Triad Grouping #4: 168 — 249 — 357
- Week #14 Triad Grouping #2: 147 — 258 — 369
- Week #16 Triad Grouping #3: 159 — 267 — 348
- Week #18 Triad Grouping #4: 168 — 249 — 357
- Week #20 Triad Grouping #2: 147 — 258 — 369
- Week #22 Triad Grouping #3: 159 — 267 — 348
- Week #24 Triad Grouping #4: 168 — 249 — 357

Use this same process for setting up triads for every Pod you lead. This formula ensures that the triad in the group supervisions stays together for those three calls which is necessary to make the group supervisions work. It also ensures that each coach will have been in a triad with all of their Podmates. *Note:* You can also set up Grouping #2 for three in a row, followed by Grouping #3 for three in a row, followed by Grouping #4 for three in a row, if you wish.

***For the Triad Calls only:*** if there are less than nine in a Pod, encourage one of them to join two triads as an opportunity to maximize their learning. Of course this means that one of the triads will have to meet at an alternate time. If they choose to meet as a pair only, remind them that the calls are still 90 minutes long.

The Group Supervision triads must stay together as assigned for all three of their calls. The assigned Supervisor will adjust the Timeline for the calls according to the number in the group.

### *Group Supervision Calls*

Group Supervision is designed to provide a laboratory experience of supervision to participants. Working in triads, participants will have the opportunity to coach, be the client and observer, and discuss their learning with the guidance of a CTI Supervisor. Group Supervisions happen in Weeks 2, 4 and 6. (Participants are strongly advised not to miss any of these calls although they may miss one. If they miss the call where they are scheduled to coach, they will need to pay for an additional individual supervision. See the CPCC Manual Chapter 4 for more details.)

Here is the basic outline for these calls, which may change as decided by the Group Supervisor depending on the needs of the group:

- (5 min.) Design alliance, get present, decide who is coach, client, observer.
- (5 min.) Review learning points for today’s call
- (15 min.) Coaching

- (30 min.) Supervisor debrief with coach
- (25 min.) Group discussion
- (10 min.) Group summarizes learning points, supervisor assigns homework/practice that will serve the coach's learning and also serve the other triad members

**Conference Calling for Group Supervision Calls**

CTI pre-assigns a teleconference line for the Group Supervisions that is distributed to the students with their Welcome Packet.

### *Triad Calls*

Students will coach on the Triad Calls using the whole model, and their feedback discussion has them distill their learning about the topic of the triad. Below is the format for these calls. They will hear about this on the Orientation Call, and you will be reinforcing it as well. (Participants may miss only one of these calls).

- (10 min.) Get connection/learning objectives.
- (60 min.) Coaching (15 min. coaching, 5 min. feedback).
- (15 min.) Land learning. This is about your learning as coaches and how you will use your learning from this topic.
- (5 min.) What will each triad member do this week in their coaching?

**Conference Calling for Triad Calls**

Participants will need to have use of either three-way calling or a conference line. As CPL, if you are providing conference lines, be sure to get them that information before their first Triad Call.

The information students get is posted here below:

1. Three-way Calling — You can often have the three-way calling feature added to your phone service on the same day for a minimal monthly fee. This is how three-way calling works: Person One calls Person Two and flashes over to another line to call Person Three, and then conferences everyone together. We recommend you each have this feature and alternate who initiates the calls to spread out the cost.
2. Conference Lines — If you prefer to use a conference line for your Triad Calls some CPLs will have recommendations or may even have lines you can use so wait to get this technology until you hear from your CPL. These telephone lines are based in the U.S., and provide a conference line at a scheduled time at no charge (other than your long-distance charge to call into the conference).
    - www.freeconferencecalling.com and www.freeconference.com both offer good quality free teleconference lines and provide international lines.
    - When you have your conference line set up be sure to share the number and access code with other *members of your triad.*

# Tips for Effective Leadership

## *Balancing Forward the Action/Deepen the Learning*

One of the traits of masterful CPLs is their ability to balance deepening the student's learning with forwarding the action on the call. The clearest way to do this is to "pick your shots," deciding how deep to take the learning in order to hold onto the arc of the whole call and the Timeline. Lean into the Learning Points on the Timelines. On every call, you will leave out interesting things in service of the learning.

## *Setting Up Powerful Coaching Exercises*

### Set Up

Being very clear in the set up of the coaching exercises will make your job easier and the learning much clearer. Know the learning objectives of the exercise.

### General Tips

- *Asking permission.* This is a habit that Certification students have gotten into that we would love to break. The designed alliance on the first Pod Call gives them permission to coach everyone in the Pod. No need to ask. Asking permission as defined in the Glossary: "This skill enables the client to grant the coaching relationship access to unusually intimate or sometimes impolite areas of focus. For example, May I tell you a hard truth? Is it all right to coach you on this issue? May I tell you what I see?"
- *Call them into powerful coaching practice.* Their practice with you can be transformative. This is a graduate coaching program. Keep noting the attributes of their Authenticity & Range – Evoking Transformation, Connection, Aliveness. Model your own as well.

### Assigning Roles

- The Timeline gives you clear suggestions for how to focus the Coach, Client and Observers. You can modify these as needed.
- Giving specific directions to each role will focus the learning, make being an Angel on the Shoulder much easier, and make debriefs more focused and concise.

### Being a Client Yourself

- The timeline will point you to times when we recommend that you are the client and you may choose to ask a student to be client as well.
- From the client role, you can give in-the-moment feedback, shift the coaching from inside the client role and still hold the learning.
- As CPL, you're uniquely qualified to be client and give feedback, and adjust the coaching on the fly. It is less intrusive

than being Angel on the Shoulder.

- This models being a powerful client for the students. Be transparent about this. They will be clients for each other on Triad Calls and these skills will raise the bar on their learning and feedback.

**Enrolling the Client in Being Co-Leader**

- You can enroll the practice clients into being co-leader, (each time they coach and at the outset of the group as a general statement).
- They are not just a receiver. How can being a client serve the learning for the coach and the rest of Pod?
- Ask them as client to stay aware of the learning and what the coach is doing or not doing. And speak it.

**Angel on the Shoulder Tips**

- For those CPLs that are also FORLs, what is different here is that we do not have a client who is a trained leader as we have in tag teams on the courses. In Certification Pods the students are not trained to respond to your promptings or hold the learning from within the client role.
- What will help in the "Angel" role is to be very clear about outcome of the coaching. The Timelines give you clarity about outcome and roles in the coaching, to help you focus your tips.
- Let students know that it not just about the learning of the coach, but it is about the learning of the whole group. Remind them not to take interruptions personally. Set it up to be more about the group than about the coach specifically.
- When you intrude, have a clear direction in mind. If you know you need to intrude but don't know what to say, ask the coach or the observers what is going on and what is needed.
- Even better, be transparent about not seeing exactly what is needed, and ask the students what they see. Keep the Learning Points and objectives in mind when you ask. Example: Don't just say, "What is the Level 3?" Instead say, "This coaching is about being curious. What is happening in the coaching around curiosity?"
- Be brief when you intrude. Job is to redirect and create learning, not give a lecture.
- It is important to hold the space of authority and clarity. Go for fun, clarity and playful rather than punitive, disapproving, or exasperated.

Having a range of approaches to how you hold the Angel on the Shoulder adds depth and dimension to the calls, and gives the students a new way to interact with you.

**Balancing Feedback and Debrief**

There is not time on the Timeline for both feedback and debrief of all coaching exercises. You need to find the balance.

# Policies/Procedures

### *Mid-Program Reviews*

- Mid-Program Reviews happen between Weeks 13–17 of the Program. Your students are responsible to set these up with you.
- Sample emails for their Mid-Program Review are in *Chapter 3: Topic Module Agendas*.
- Use the Mid-Program Review format posted at the end of this section and also on the CPCC website to complete your Mid-Program Reviews.
- Once completed, upload your completed Mid-Program Review forms on the CPCC website for that Pod. Email the Certification Program Specialist at CTI letting them know the forms for your Pod have been uploaded.

### *Written Exams*

- You will email the Written Exam to your Pod after the Week 23 Pod Call.
- They need to complete it and email it back to you only prior to the Completion call Week 25.
- You have two weeks from the final call to review, grade and upload the exams on the CPCC website for that Pod.
- Once you have uploaded the Written Exams on the CPCC website, email the Certification Program Specialist letting them know.
- CTI will notify students of their exam results via email within 30 days of their last Pod Call.

**What to do with a failed exam:**

— As CPL, you have the option to email a student and have them rewrite a question or two that is incomplete or needs more information to pass the exam rather than failing them. If you feel that the student does not know the material well and would benefit from a review then you should fail the student.

— If the student fails the exam, send a copy of the exam to the Certification Program Specialist. Make sure to keep a copy so that you can complete the failed exam review with the student.

— The Certification Program Specialist notifies the student of the fail, but provides no details or scores. She will tell the student to contact the CPL for a copy of their exam and to schedule an Exam Review call. No need to give the student the score sheet.

— In the failed exam review call, point the student to where they need to study (reading, listening to CDs, open topic calls or notes/homework).

— CPL will decide which questions need to be re-written, and create the re-take exam from the re-take template provided. Make sure to give them a deadline for returning it to you. You do not have to have them answer all missed questions. Have them re-answer the questions that you decide are needed. Note: The re-take requires a 90% pass rate on all the questions on the re-take exam.

— Give them up to two weeks to study, answer and get exam back to you. You get to decide if you have them study first for a few days and then send exam out to them, depending on what is needed. Design with the student.

**Grading the re-take exam:**

— The student has the option of scheduling an hour-long review with their CPL. If they choose to do this, you charge CTI $140 for this time.

— The student re-takes the exam.

— The CPL grades the re-take exam and is paid $50 for this.

— The student must get 90% of the total points for the questions they re-answered to pass the re-take.

— Results are sent to CPS who notifies the student via phone within 48 hours of the re-write being received by CTI.

— When invoicing CTI, separate the two charges for grading the retake and the exam review and note the student's name.

**General**

- If a student misses 20 minutes or more of a call, it is considered a missed call.
- If a student changes coaches while in the Program, they need to complete a form and send it to the Certification Program Specialist.
- There is a form for students to fill out if they are coaching internal clients. There is also a form for students to fill out if they are doing any group or relationship coaching.
- Students in the Program must be coached by a coach who is certified by CTI or currently has a PCC or MCC from the ICF. The minimum amount of time is six hours, requiring coaching at least one hour per month during the 6 month Program.

### *Students Who Have Less Than Five Clients*

Students have until Pod Call #2 in Week 3, to have five practice clients. If at any time in the course of the Program a student drops below five practice clients, it is his or her responsibility to notify you, their CPL, outside of reporting this in his or her stats, and to have a conversation with you about how to raise the number of practice clients. At that point, the student will be given two weeks to have a roster of five clients or the student will be asked to leave the Program.

Remember, students can check back to the Client Game from the beginning of Certification to get ideas on how to recruit more practice clients and also engage with their Podmates to help them reach their five-client goal.

Encourage your students to have some kind of back up in place to avoid dropping below five clients.

### *Substitutions on CPL Calls*

Some information about CPL missing Pod Calls:

- You must be on the first three calls and the last call. This is to be sure to set up context and relationship in the beginning and for closure at the end.
- To find and set up a substitute for your call:
  - — Find another CPL who is willing to take your call.
  - — Make arrangements with them regarding whether this is a give-away — part of just covering each other and the whole pool of CPL's — or if you will be paying the substitute for their time. Make these arrangements on your own.
- The final and very important step is to let the Certification Program Specialist know about the substitution ahead of time.

### *Billing for CPL*

Bill CTI 50% at the start of the Pod, 25% at mid-point and 25% at the end of the Pod.

When you send in your invoice for the 25% fee due at the mid-point of the Program, you will need to send all of your Mid-Program Reviews prior to or at the time of billing. If some students in your Pod are doing their Mid-Program Reviews a bit later in the Program, just state that with your invoice. In that case, all Mid- Program Reviews will need to be received by CTI before you are paid your final 25% fee for the Pod.

In addition, all graded Written Exams for your Pod must be received by CTI before your final 25% fee will be paid.

### *Late Payments by Students*

This is an FYI. A student that is more than one month behind in their payments, could be asked to leave the Program. Accounting would let the Certification Program Specialist know and they would discuss this with the CPL and the student. A final decision would be made together.

# Mid-Program Review Report

*The Coaches Training Institute Certification Program*

**Student's Name:**

**CPL's Name:**

**Pod Name:**

**Date of Review:**

Summary of feedback from CPL:

Answers to Mid-Program Review questions submitted by student:

Additional comments/feedback from supervisors or other sources: