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Certification Program Information Packet

REVISED July 2014
Version 7.06

INTRODUCTION

Thank you for your interest in becoming a Certified Professional Co-Active® Coach!

Our vision is that of a viable, ethical, and exemplary Co-Active® Coaching community. We are committed to your future as a professional coach. The Certification Program is a rigorously structured program of supervised, self-guided, group, and individual study. The Program is designed for dedicated professionals committed to their individual personal growth for the sake of aliveness and discovery of their clients. While the Program builds on the foundation of knowledge and experiences you have created in your study with CTI in our core curriculum, this Program uses different technologies and experiences to continue your development as a Co-Active® Coach.

Please READ THIS PACKET THOROUGHLY to ensure that you are familiar with all aspects of the Program before submitting your application. When you click on the Indication of Agreement button when filling out your application you are signing a legal document agreeing to the policies presented in this information packet.

****All prices listed in this information packet are in U.S. dollars.***

Prerequisites

1. Completion of all four courses (Fundamentals, Fulfillment, Balance & Process) needs to be completed in order to apply and Synergy needs to be completed by the end of the Certification 25-week Program.
2. A coaching relationship with any coach who is currently certified through CTI (CPCC) or currently has a PCC or MCC designation through the International Coach Federation.

Registration

You may register for the Certification Program at any time by going to CTI's website to register and pay the deposit. You will not be fully registered until a completed application has been submitted. You will be placed in a Pod of 9 participants. The number of Pods started in any given month depends upon the number of applications received. You will not be enrolled into a Pod until you have satisfied the pre-requisites and submitted a complete application.

Timing

Certification is a 25-week Program. All classes are typically scheduled on Tuesdays and Wednesdays. The actual time of your weekly scheduled call will depend on the Pod that you are enrolled in. You should expect to spend at least three to five hours per week on Certification in addition to coaching your clients.

Application Process

We take applicants on a first come first served basis. If you would like to apply to participate in the Certification Program, your completed application is due no later than the first of the month prior to the month in which you wish to begin (i.e. deadline is April 1st for the May Program). There are a limited number of spaces available each month. We recommend that you get your application in early. You must be registered and have paid the deposit for your application to be considered.

Your application must be submitted online. The link to the online application is:

www.coactive.com/coach-training/certification/registration.html

If, after reviewing this packet, you need additional information or have questions please contact:

**CTI Customer Service
(415) 451-6000, Option 1 or Toll Free (800) 691-6008, Option 1
certification@coactive.com**

Program Timeline

The Program is organized into 13 Pod Calls, 9 Triad Calls, and 3 Group Supervision Calls. During odd numbered weeks you will attend Pod Calls with your group and your Certification Program Leader (CPL). In even numbered weeks you will attend Group Supervision in Weeks 2, 4, and 6 and Triad Calls for the remaining even numbered weeks of the Program.

In-Course Requirements

1. Listen to a live or pre-recorded orientation call prior to the Program start date.
2. Attendance at 11 of the 13 Group Instruction Calls.
3. Attendance at 8 of the 9 Triad Calls.

4. Attendance at 2 of the 3 Group Supervision Calls.
5. Complete 6 Individual Supervision Coaching Calls.
6. Listen to the assigned module audios prior to all scheduled calls with your Pod members.
7. Listen to all 4 additional Podcasts (one hour each) and at least two additional Open Topic Calls.
8. Complete the required reading and homework assignments.
9. Maintain a roster of 5 individual paying clients. Your 5-client roster must be complete by your second Pod Call to remain in the Program. (See details in the following section.)
10. Complete 100 hours of paid Co-Active® Coaching. (See details in the following section.)
11. Have an ongoing coaching relationship with any coach who is currently certified through CTI (CPCC) or currently has a PCC or MCC designation through the International Coach Federation. During the Certification Program you must meet with your coach for a minimum of 6 hours, coaching at least one hour per month. You can count up to 12 hours with your coach towards the 100 coaching hours required to sit for your exam. The more time and frequency spent with your coach, the better support you will have during your Certification Program. Your coach must be certified at the time you submit your application. No exceptions will be made.
12. Complete Synergy by the time your Certification Program is complete.
13. Complete the written exam at the completion of the 6-month Program.
14. All of the above must be completed before you are eligible to take the oral exam.
15. High-speed internet access. You will use the CPCC website to track your progress in meeting these requirements.

Phone Calls

We do not recommend using Skype due to call quality problems and the potential impact on the group. If your connection causes disturbance on the line, regardless of the calling method you are using, you will need to hang up and call back in using another method. Please have an alternate plan prearranged.

Client Roster

By your 2nd Pod Call, which is in the third week of your Program, you must complete a roster of at least five paying clients. “Paying client” means that there is an exchange of money for services for your coaching. One of your five clients can be a barter or pro-bono client. We define “barter” as an exchange of services, not including coaching, of equal value to the coaching services you provide. You can count internal coaching clients if you meet the following criteria:


- >> Coaching is part of your job description
- >> You are only doing one on one coaching with these internal clients
- >> You are only coaching with them in the sessions and no other functions, i.e. consulting, etc.
- >> Your internal clients are not your direct reports.

You will need about eight clients if you wish to complete your 100 coaching hour’s requirement within the 25-week Program. If you fall below five clients at any time, you will be given 2 weeks to fill your client roster. If you are unable to do so within the time frame given, you will be asked to leave the Program, and you will be refunded based on the refund schedule on page five under the “Certification Program Policies” section of this packet. For this reason, if you wish to have only five clients, we encourage you to have some kind of cushion in place, whether it be extra clients, a waiting list, or emergency marketing strategies.

Paid Coaching Hours (100)

During the Program you will complete 100 hours of paid coaching. The criteria for what counts toward these hours is as follows:

- >> You may include up to 15 hours, but no more, of barter and/or pro-bono coaching.
- >> Coaching work as a client with your own coach counts up to a maximum of 12 hours. You should have a minimum of 6 hours (one hour of coaching per month).
- >> You may count group coaching hours towards your 100 coaching hours.
- >> There is no limitation on the number of group coaching hours as long as it is an on- going coaching relationship with the group and not a workshop



or class. (e.g.: One hour of coaching with up to 15 people in a group is counted as one coaching hour; it's not the number of hours multiplied by the number of clients in the group.) Group coaching clients are in addition to the 5 individual clients required. The clients in the group should not vary from session to session and should be consistent.

- >> Coaching done in workshops, classes, or programs cannot be counted. This includes group coaching.
- >> You can start counting your coaching hours after you have completed your first Certification Pod Call.
- >> Coaching hours with other Certification students do not count towards your 100 coaching hours.

Course Materials

The Certification course materials are delivered in electronic format. Prior to your Program start date you will receive access to an online community where you can download the Program materials as follows:

- >> **Pod Welcome Packet** – Your Welcome Packet contains a roster of your Certification Pod and information on your Call schedule, Pod Leader and Supervisors.
- >> **CPCC Manual** – A hard copy version is available for an additional fee. You will be given instructions to order a hard copy, should you choose to, after you have been confirmed into a Pod and given access to the CPCC website.
- >> **Forms** – Forms to track various aspects of the Program.
- >> **Audios** – 12 Audios provide the core content of the course. You will be required to listen to the complete set. The audios can be downloaded as MP3 files or played as streaming audio online.
- >> **Open Topic Calls** – You will be required to listen to at least 6 Open Topic Call recordings. Four of these are mandatory and you need to listen to at least two more. These calls cover various areas of interest to new coaches.

Certification Exam Information

- >> The Certification exam is administered in two sessions, a written session and an oral session.
- >> The written exam is administered by your Pod leader and is due by your last Pod Call.
- >> The oral exam is administered by phone and must be completed within one year of your first Pod Call.
- >> All Certification Program documented requirements and homework must be received no later than 30 days after your last Pod Call, with the exception of the 100 coaching hours. The coaching hours are due 30 days prior to your oral exam or you will be withdrawn from the exam with no refund.
- >> The exam fee is included. You will be charged a \$75 fee for canceling your exam or if you transfer within 30 days of your exam date. There are no cancellations or transfers within 7 days of your exam date.
- >> Should you be unsuccessful in passing the oral exam the first time, there will be an additional fee of \$400 to retake the exam. You are required to schedule your retake within four months of your initial exam.

Program Fees

If you have not previously registered, the Certification enrollment fee is \$5,990, which is comprised of a deposit of \$1,290 due at the time of registration, and a balance of \$4,700. (If you previously registered into a discount package then your pricing is different and your deposit is already on file.) If a third party is paying for your Program, they must provide a credit card or pay the balance in full up front. The funds can be sent by wire transfer directly to our Bank; however, monthly payments being made by wire transfers are not acceptable. Contact CTI Customer Service for wiring instructions.

The balance is due as follows: the first of five automatic credit card charges will take place the 1st of the month following the start date of your Program and approximately every 30 days thereafter. These payments will be charged to the credit card we have on file. Your account must be current for you to register for your exam. CTI reserves the right to dismiss you from the Program if your account is more than 30 days in arrears.

The cost of the Certification Program DOES NOT include:

- >> Your certified coach: price will vary, approximately \$300 per month
- >> Long-distance phone charges: price will vary, approximately \$62
- >> Device or service to record phone calls: price will vary
- >> Missed Supervisions: \$140 per incident

Required Book:

Co-Active Coaching, 3rd edition, by Henry Kimsey-House, Karen Kimsey-House, & Phil Sandahl. (You may already have this from doing the Core Curriculum courses.)

Use of CTI Intellectual Property

CTI students may use materials presented during their course work, including materials on CTI's Learning Hub, in their work with their coaching clients only. Any use of CTI Intellectual Property beyond one-to-one coaching is not allowed without the specific written approval of CTI.

Payment and Enrollment

You may pay by check, VISA, MasterCard, American Express or Discover. Your signature on the Registration Request Form authorizes CTI to automatically charge your credit card. BALANCES DUE: five automatic credit card charges of \$890 each will take place the 1st of the month following the start date of your Program and approximately every 30 days thereafter.

All Program enrollments are subject to availability. You will receive written notification of your enrollment status. If there is no space in the month you have selected, we will contact you about other options. Your enrollment in the Program is based on acceptance of your application and the receipt of funds for both the deposit and balance due. In the process of enrolling you in your requested Program, CTI will notify you if there are questions about your application and/or if there are insufficient funds. If we do not hear from you within 48 hours of our notification, your requested space in the Program will be released.

Certification Program Enrollment Requirement

In order to retain the package discount for your Certification Program, you will need to register for a specific start month within six months of the completion of your Synergy course. Beyond six months of completing Synergy, if you have not registered for your start month, your pricing will revert back to the à la carte price.

Buyer's Right to Cancel

You have a right to cancel this enrollment agreement and receive a refund by providing a written notice to: The Coaches Training Institute, 4000 Civic Center Drive, Suite 500, San Rafael, CA 94903, USA. You do not have the right to cancel by telephoning or emailing the school, or by not attending the Program you are registered for. If you are a Minnesota student, please see the Minnesota Student Buyer's Right to Cancel.

Right of Refusal

CTI reserves the right to refuse a student participation in courses and/or Programs. In addition, upon the recommendation of the CTI Program Leader, CTI reserves the right to remove from a Program and/or classroom a student who is negatively impacting other students and/or the learning environment.

Refund Policies

FOR ALL CERTIFICATION PROGRAM PARTICIPANTS, EXCEPT MINNESOTA RESIDENTS:

GENERAL INFORMATION REGARDING CANCELLATIONS, WITHDRAWALS, AND REFUNDS:

If you choose to cancel your enrollment before the beginning of the Program, you will receive a full refund minus a \$50 non-refundable registration fee. If you cancel after the start of your Program, a refund will be pro-rated for the unused portion of the Program. If you withdraw from the Program, after the 5th business day of the start of the course, you will receive a pro-rated refund, minus the \$50 non-refundable registration fee, based on the time completed in the course. The refund is calculated from the postmarked date of the written notice. For example, if a student's cancellation is received after completing 50 Program hours and paid \$5,650, the refund would be calculated as follows: \$5,650 (Program Tuition) – \$50 (non-refundable Registration Fee) = \$5,600 (Program Fee less Registration Fee). \$5,600 divided by 92 (Total Program hours)

= \$60.87 (Amount per Program hour) x 42 (Program hours not attended) = \$2,556.54 (Student Refund Amount). *TRANSFER FEES:* Students may transfer from one course start date to another two times without penalty, provided the request is made 60 days before the course start date. Subsequent transfers, as well as any transfer made within 60 days of the course start date, will be assessed a \$175 fee. **TRANSFERS ARE NOT ALLOWED AFTER WE HAVE CONFIRMED YOU INTO A POD.**

NOTICE OF CANCELLATION/WITHDRAWAL AND REFUNDS: Written notice of cancellation shall take place on the date the notification of cancellation/withdrawal is delivered to the school. Refunds will be made within 30 days following the receipt of written requests.

FOR CALIFORNIA RESIDENTS ONLY:

The Coaches Training Institute is licensed with the Bureau for Private Postsecondary and Vocational Education, State of California. Licensing means we have met certain minimum standards imposed by the state for licensed schools on the basis of our written application to the state. You will receive an enrollment agreement that details the full refund and Program policies for your state.


FOR MINNESOTA RESIDENTS ONLY (MINNESOTA STUDENT BUYER'S RIGHT TO CANCEL):

GENERAL INFORMATION REGARDING CANCELLATIONS/

WITHDRAWALS AND REFUNDS: Each student will be notified of acceptance/rejection in writing. In the event a student is rejected, all tuition, fees and other charges shall be refunded. Notwithstanding anything to the contrary, if a student gives written notice of cancellation within five business days of the execution of the contract (for schools using written contracts) or day on which the student is accepted (for schools not using written contracts), then a complete refund is given regardless of whether the Program has started. If a student gives written notice of cancellation after five business days of the execution of the contract (for schools using written contracts) or day on which the student is accepted (for schools not using written contracts), but before the first lesson has been serviced by the school, then all tuition, fees and other charges, except 15% of the total cost of the Program (15% not to exceed \$50) shall be refunded to the student. If a student gives written notice of cancellation after the first lesson is completed, but before completion of 75% of the period of instruction, then the student is assessed a pro rata portion of tuition, fees and all other charges based on the number of days in the term plus 25% of the total Program cost (25% not to exceed \$75).

Any notice of cancellation shall be acknowledged in writing within 10 business days of receipt of such notice and all refunds shall be forwarded to the student within 30 business days of receipt of such notice. This refund policy is not linked to any student conduct policy and any promissory instrument shall not be negotiated prior to the completion of 50% of the course.

NOTICE OF CANCELLATION/WITHDRAWAL AND REFUNDS: Written notice of cancellation shall take place on the date the notification of cancellation/withdrawal is delivered to the school. The date of execution of the enrollment agreement shall be presumed to be the date of delivery of the notice of acceptance; and if delivered by mail, the postmark date of the letter of acceptance. **TRANSFER FEES:** You may transfer from one course date to another two times without penalty, provided the request is made more than twenty-one (21) days (60 days for Certification once your application has been received and confirmed) before the course start date. Subsequent transfers, or transfers that occur within the 21 day window (60 days for Certification once your application has been received and confirmed), are assessed a USD \$175 fee. Certification Program transfers are not allowed once you are confirmed into a Pod.



The Coaches Training Institute is licensed as a private career school with the Minnesota Office of Higher Education. Licensure is not an endorsement of the institution. Credits earned at the institution may not transfer to all other institutions. The educational programs may not meet the needs of every student or employer. Any questions or problems concerning this school, which have not been satisfactorily answered or resolved by the school, should be directed to: Minnesota Office of Higher Education, 1450 Energy Park Drive, Suite 350, St. Paul, MN 55108-5227

FILLING OUT THE APPLICATION

Pod Assignments

Pods are not created until after the application deadline has passed for each month. At that time we can determine how many classes we are able to open for that month. There are 9 students in a Pod and we will open as many Pods as we are able, based on the number of applications we receive. An email will be sent to all applicants letting them know what Pods have been created for that month. At this time the applicant will let us know what Pod times they are able to attend from the offered times. We will then place students into the Pod time of their choice according to the order in which your application was received. Pods are typically offered on Tuesdays and Wednesdays and can start as early as 4a.m. Pacific Time and as late as 5p.m. Pacific Time. Pods tend to start toward the end of each month.

Application Basics

Please note that your completed Certification Program Application must be received by CTI no later than the first of the month prior to the month in which you would like to begin (i.e. application is due April 1st if you want to start in May). There are a limited number of spaces available each month. We take applicants on a first come first served basis. If your application is submitted on or near the deadline, it may be one of the last ones received, and you may be bumped to the next month's Program. Please submit your application early! You must have completed Process to submit your application.

SECTION A: CONTACT INFORMATION

Your information will be shared only with your Certification Pod and leaders. CTI holds all student information confidential.

SECTION B: COACHING INFORMATION

- >> Please indicate the month you intend to start Certification from the drop down list.
- >> Indicate the length of time you have been coaching in months or years.
- >> Indicate the languages in which you coach.
- >> You will complete 3 Individual Supervision Calls with each of your 2 assigned individual supervisors during the Program. You will be required to record some of your coaching calls and your supervisor will be giving you feedback on your coaching. We do have a LIMITED number of supervisors who are able to do the Supervisions in other languages, so please indicate in which languages you coach on your application. We will

accommodate your language preference if it is possible, however, we may not be able to do so for all of your Supervisions. PLEASE NOTE THAT YOU WILL NEED TO HAVE AT LEAST ONE CLIENT WHOM YOU CAN COACH IN ENGLISH TO ENSURE THAT YOU ARE ABLE TO DO THE SUPERVISION PORTION OF YOUR PROGRAM.

- >> Please give the finish date of your Process course and the start date for your Synergy course.

We recommend that you complete the Core Curriculum course, Synergy, during the first half of your Certification Program. YOU ARE REQUIRED to complete Synergy prior to taking your Certification Exam.

- >> You must provide the name of your certified coach and how often and how long you meet. CTI requires this information at the time of application to ensure you are in a coaching relationship when you begin the Certification Program. Your coach must be certified, at the time of your application, through CTI (CPCC) or have a PCC or MCC designation through the International Coaching Federation.

SECTION C: MATERIALS DELIVERY

The Certification course materials are delivered online. A hard copy version of the Manual is available for an additional fee. You will be given instructions to order a hard copy, should you choose to, after you have been confirmed into a Pod. Prior to your Program start date you will receive access to an online community where you can access the Program materials.

SECTION D: AGREEMENTS

You must read, agree, and click on the “INDICATION OF AGREEMENT” in Section E for your application to be complete. These agreements are intended to support your full participation and insure that you gain the greatest benefit possible from your investment.

You will be agreeing to the following CONFIDENTIALITY AGREEMENT: All recordings, the CPCC Manual and the contents of the CERTIFICATION COMMUNITY are the intellectual property of CTI. These resources are for the exclusive use of the Certification students and may not be distributed in any way or form without the express written consent of CTI. I also agree that Pod and Triad Calls may be recorded for either training purposes or for use of other Pod members and that your oral exam recordings may be used to train examiners.

Monthly Payment Information

Your remaining balance is to be paid in five automatic credit card payments, beginning the 1st of the month following the start date of your Program and approximately every 30 days thereafter. All participants, with the exception of those who paid the Program fees in full, must have a valid credit card on file. When you submit on your online application, you must also provide credit card information for future payments.

Application Review Process & Certification Enrollment

CTI will notify you of your application status via email within 48 business hours of receipt.

As stated above, not all applicants may be able to begin in the month for which they've applied. Classes are limited to 9 people, and priority for placement in Certification Pods is given based on when approved applications are received, earliest to latest. You are not confirmed to begin in a particular month's Certification Program until you have been placed in a Pod and receive the Pod confirmation email.

CTI will contact you by email, after your application is received and the application deadline has passed, to notify you of the specific available dates and times. All classes are currently scheduled on Tuesdays or Wednesdays. You will be given approximately 3 to 5 days to contact the CPS with your first and second choice of Pod times. After all time preferences have been received from approved applicants, the CPS will contact you via email to confirm your status in a Pod or help you choose a future start month.

Your access to the course materials will arrive via email. When you receive the email you need to verify that you are able to download the materials prior to your Orientation Call. You will be required to attend a live or a pre-recorded Orientation Call prior to your first scheduled Pod Call.