



CO-ACTIVE[®]
TRAINING INSTITUTE

Co-Active Coach Certification Program

Information Packet



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Copyright Notice

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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 Coach 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 check that you agree to the terms 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. Fundamentals, Fulfillment, Balance, and Process need to be completed in order to apply, and Synergy need to be completed by the end of the Coach Certification 25-week program.
2. Have an established coaching relationship with a coach who is certified as a Certified Professional Co-Active Coach (CPCC) and a Professional Certified Coach (PCC) or a Master Certified Coach (MCC) from the International Coach Federation (ICF).

Registration

You may register for the Coach Certification program at any time by going to CTI's website to register and pay the registration fee. You will not be fully registered until a completed application has been submitted. There are 9 participants in a Pod. 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 prerequisites, submitted a completed application, and gone through the scheduling process to be placed into a Pod.



Timing

Coach 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 you are enrolled in. You should expect to spend at least 3 to 5 hours per week on Coach 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 Coach Certification program, your completed application is due no later than the 1st of the month prior to the month in which you wish to begin (e.g., deadline is April 1 for the May program). There are a limited number of spaces available each month. We recommend you get your application in early. You must be registered and have paid the registration fee for your application to be considered.

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

<https://coactive.com/training/professional-coach-certification/>

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

CTI Coach Certification Department
(415) 526-1627 or toll free (800) 691-6008, extension 1627, or
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 Coach Certification program leader. 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 the pre-recorded orientation calls prior to the program start date.
2. Attend at least 11 of the 13 group instruction calls.
3. Attend at least 8 of the 9 Triad calls.
4. Attend all 3 group supervision calls. If you miss a call you will need to pay for an additional Individual Supervision with your Group Supervisor. The cost of this replacement Supervision is \$165.
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 at least two additional open topic calls.
8. Complete the required reading, audio, and homework assignments.
9. Pass the program quizzes.
10. Maintain a roster of 5 individual ongoing paying clients. Your 5-client roster must be complete by your second Pod call to remain in the program. "Ongoing" means you are coaching each client for a minimum of one hour, each month, for at least 3 months. While they do not have to be consecutive months, we strongly encourage this. Coaching sessions must be a minimum of 30 minutes per coaching session. This applies to internal and external coaches. This requirement is separate from the minimum coaching hours that is required with your certified coach each month.
11. Complete 100 hours of paid Co-Active coaching. (See details in the following section.)
12. Have an established coaching relationship with a coach who is certified as a Certified Professional Co-Active Coach (CPCC) and a Professional Certified Coach (PCC) or a Master Certified Coach (MCC) from the International Coach Federation (ICF). No exceptions will be made for coaches without both credentials. During the Coach Certification program, you must meet with your coach for a minimum of 6 hours, **coaching at least 1 hour per month**. You can count up to 12 hours with your coach towards the 100 coaching hours required to take the oral exam. The more time spent with your coach, the better the support you will have during your Coach Certification program. Your coach must be certified at the time you submit your application.
13. Complete Synergy by the time your Coach Certification program is complete.
14. All required paperwork must be submitted and approved prior to scheduling your oral exam date.

Program requirements will not be excused due to participation in other CTI programs. All requirements must be completed and approved prior to scheduling the oral exam.

You will use the Coach Certification learning platform to track your progress in meeting these requirements. You must have adequate computer skills to navigate websites, download and submit electronic documents, access and download audios and recordings, and take part in Zoom video conference calls.

Phone Calls

Most Coach Certification calls are held on Zoom, an online video conference platform.

You may also need to dial long distance or internationally to meet with your colleagues.

Client Roster

By your 2nd Pod call, which is in the third week of your program, you must validate that you have at least 5 ongoing, paying clients. You must maintain at least 5 ongoing clients until your 100 coaching hours are completed. “Paying client” means there is an exchange of money for your coaching services.

“Ongoing” means you are coaching each client for a minimum of one hour, each month, for at least 3 months. While they do not have to be consecutive months, we strongly encourage this. Coaching sessions must be a minimum of 30 minutes per coaching session. This applies to internal and external coaches. This requirement is separate from the minimum coaching hours that is required with your certified coach each month.

You will need about 8 clients if you wish to complete your 100 coaching hours’ requirement within the 25-week program. If you fall below 5 clients at any time, you will be required to notify your Coach Certification program leader and the Coach Certification department. 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 under the “Policies” section of this packet. If you wish to have only 5 clients, we encourage you to have some kind of cushion in place, whether it be extra clients, a waiting list, or emergency marketing strategies.

What Counts Toward My 100 Coaching Hours?

You may count the following in your 100 coaching hours:

- 6 to 12 hours being coached by your coach (1 hour per month is required, and you can count a maximum of 12 hours).
- Discovery/foundation sessions with clients.
- Ongoing coaching with at least 5 clients. “Ongoing” means you are coaching each client for a minimum of one hour, each month, for at least 3 months. While they do not have to be consecutive months, we strongly encourage this. Coaching sessions must be a minimum of 30 minutes per coaching session. This applies to internal and external coaches. This requirement is separate from the minimum coaching hours that is required with your certified coach each month.
- Completion sessions.
- Up to 15 hours of barter or pro bono coaching, as long as you have determined a fair dollar amount of services provided and are receiving services other than coaching in return from your client.



- Internal coaching: hours spent as an internal coach count toward your 100 hours of coaching time if you meet the following criteria: Coaching is part of your job description or job objectives.
 1. You are not coaching a direct report.
 2. You meet on an ongoing basis with at least 5 of your clients.
 3. You are doing only one-on-one coaching and no other functions during that time (e.g. consulting, time management, etc.).
 4. You are using the Co-Active Model with your clients.

What Does Not Count Toward My 100 Coaching Hours?

- Coaching current Coach Certification students—any student who has started Coach Certification and is not yet a CPCC is a current student.
- Demonstrations of coaching in a workshop, training, or classroom.
- Coaching in a workshop, training, or classroom.
- Sample sessions with potential clients. Note that these hours may count toward an ICF credential, so keep track of these hours separately. Refer to the ICF website for their current requirements.
- Trading coaching with other coaches.

Course Materials

The Coach Certification course materials are delivered using an online learning platform. Prior to your program start date, you will receive access to the platform, where you can access the program materials and information.

Completing the Program

The final aspect of Coach Certification is the oral exam. The oral exam is held on the Zoom video conferencing platform and must be completed within 1 year of your first Pod call.

All Coach Certification program requirements must be completed within 30 days after your last Pod call, with the exception of the 100 coaching hours. You have 1 year from your Pod start month to complete your 100 coaching hours. When you have validated with CTI that you have met all program requirements, including your 100 coaching hours, you then have 30 days to schedule your oral exam.

There is no additional fee for the oral exam; however, if you cancel or reschedule within 30 days of your exam date, you will be charged a \$75 fee. There are no cancellations or transfers within 7 days of your exam date.



If you are unsuccessful in passing the oral exam the first time, there will be an additional fee of \$400 to retake the exam. We request that you allow at least 1 month between your first exam attempt and your exam retake, and that you retake your exam no later than 4 months after your original exam date. Your examiner may have specific recommendations regarding how long to wait before scheduling your retake exam.

You have exactly 1 year to retake your oral exam from the date of your first oral exam attempt. If you do not retake your oral exam in that 1-year time frame, you are no longer eligible to obtain the CPCC credential through CTI. In that case, we will refer you to the ICF to apply for a credential through that organization.

2020 Addendum

As of March 2020 the following accommodations will be made for all Certification participants including: (1) participants registered and waiting to start with their pod, (2) participants currently active in a Certification pod, or (3) participants that have completed with their pod and still working toward meeting the original program requirements:

Number of on-going, paying clients

If needed, participants will now have 30 days (instead of 14 days) to find additional clients when their client roster drops below 5 ongoing, paying clients. Participants must still notify CTI when their roster drops below 5 ongoing, paying clients by sending an email to certification@coactive.com.

Coaching hours

Students will now have 15 months (instead of 12 months) to complete 100 coaching hours.

Number of eligible pro bono hours

Students will now be able to count up to 25 hours (instead of 15) of pro bono coaching hours towards the total 100 hours requirement.

Policies

Program Fees

If you have not previously registered, the Coach Certification enrollment fee is \$5,990, which comprises a non-refundable registration fee of \$250 due at the time of registration and a balance of \$5,740. (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 made by wire transfers are not acceptable. Contact CTI Customer Service for wiring instructions.

The balance is due as follows: the 1st of 5 automatic credit card charges will take place the 1st business day of the month starting the month you begin your program and approximately every 30 days after. 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 Coach Certification program DOES NOT include:
- Your certified coach: price will vary, approximately \$300 per month
- Long-distance phone charges: price will vary, but most calls are held on a free video conferencing platform
- Device or service to record phone calls: price will vary
- Missed supervisions: \$165 per incident

Required Reading

Co-Active Coaching, 4th edition, by Henry Kimsey-House, Karen Kimsey-House, & Phil Sandahl. (You may already have this from taking 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. The balance is due as follows: the 1st of 5 automatic credit card charges will take place the 1st business day of the month starting the month you begin your program and approximately every 30 days after.

All program enrollments are subject to availability. You will receive email 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 registration fee 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.

Coach Certification Program Enrollment Requirement

To retain the package discount for your Coach Certification program, you will need to start the Coach Certification program within 12 months of completing Synergy or your Coach Certification discount will be forfeited and will revert to a la carte pricing.

Buyer's Right to Cancel

You have a right to cancel your enrollment and receive a refund by delivering a written notice to The Co-Active Training Institute, 2370 Kerner Blvd, Suite 370, San Rafael, CA 94901 or by emailing certification@coactive.com. You do not have the right to cancel by telephoning the school or by not attending a course 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 COACH CERTIFICATION PROGRAM PARTICIPANTS, EXCEPT MINNESOTA RESIDENTS:

If you choose to cancel your enrollment before the beginning of the program, you will receive a full refund minus a \$250 nonrefundable registration fee. If you cancel after the start of your program, a refund will be prorated for the unused portion of the program. If you withdraw from the program after the 7th business day of the start of the course, you will receive a prorated refund, minus the \$250 nonrefundable 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 paying \$5,990, the refund would be calculated as follows: \$5,990 (program tuition) minus \$250 (nonrefundable registration fee) = \$5,740 (program fee less registration fee). \$5,740 divided by 92 (total program hours) = \$62.39 (amount per program hour) x 42 (program hours not attended) = \$2,620.38 (student refund amount).



TRANSFER FEES: Students may transfer from 1 course start date to another 2 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 \$125 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 45 days following the receipt of written requests.

FOR ALL CERTIFICATION STUDENTS: The Co-Active Training Institute is licensed with the Bureau for Private Post secondary 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.

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 that 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 their applications were received. Pods are typically offered on Tuesdays and Wednesdays and can start as early as 4 a.m. Pacific Time and as late as 5 p.m. Pacific Time. Pods tend to start toward the end of each month.

Application Basics

Please note that your completed Coach Certification program application must be received by CTI no later than the 1st of the month prior to the month in which you would like to begin (e.g., application is due April 1 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 monthly deadline, you may be moved to the next month's program.* Please submit your application early! You must have completed Process to submit your application.



Step 1: This Information Packet

Check the box in Step 1 of the application to indicate you have read and understood this information packet.

Step 2: Provide Contact Information

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

Step 3: Request Certification Start Date

Please indicate the month you intend to start Coach Certification from the drop-down list.

Step 4: Coaching Experience

- Indicate the number of clients you are currently coaching.
- 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.***

Step 5: Hire Your Coach

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 Coach Certification program. Your coach must be certified as a Certified Professional Co-Active Coach (CPCC) and a Professional Certified Coach (PCC) or a Master Certified Coach (MCC) from the International Coach Federation (ICF).

Step 6: Agree to Terms

You must read, agree, and click on the checkbox indicating you agree to the terms in “Step 6: Agree to Terms” for your application to be complete. This agreement is intended to support your full participation and ensure that you gain the greatest benefit possible from your investment.



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

Monthly Payment Information

The 1st of 5 automatic credit card charges will take place the 1st business day of the month starting the month you begin your program and approximately every 30 days after. 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 your online application, you must also provide credit card information for future payments.

Application Review Process & Coach 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 Coach 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 Coach Certification program until you have been placed in a Pod and have received 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 respond to the Coach Certification Program Supervisor with your first and second choice of Pod times. Note that the more Pod times you are able to give us, the better your chances are of getting into a Pod for that month. After all time preferences have been received from approved applicants, the Coach Certification Program Supervisor will contact you via email to confirm your status in a Pod or help you choose a future start month.

The Coach Certification course materials are delivered online. Prior to your program start date, you will receive access via email to an online community where you can access the program materials. When you receive the email, you need to verify that you are able to access the materials prior to your call. You will be required to listen to pre-recorded orientation audios and videos prior to your first scheduled Pod call.

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