

Wellness Coach Model

June 2023

Outline

Introduction

Overview of Wellness Coach Roles

Detail on Wellness Coach Roles

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The Need for Wellness Coaches

The 2021-2022 California Budget included a \$4.4 billion investment and **five-year plan to transform the behavioral health (BH) system for children and youth.**

As part of that funding and plan, **HCAI received \$338M to design and build the Wellness Coach workforce.**

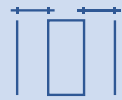
The Wellness Coach role is designed to...



increase overall capacity to support growing youth behavioral health needs.



build a **diverse behavioral health workforce with lived experience** working in a **wide variety of school, health, and community settings.**



fill some of the workforce gaps that exist today. (i.e., few existing BH roles require 1-4 years of education)



ensure the role is both a **desirable occupation in and of itself and a stepping-stone** to more advanced BH roles.



engage directly with youth (aged 0 – 25), while ensuring adequate training and supervision.

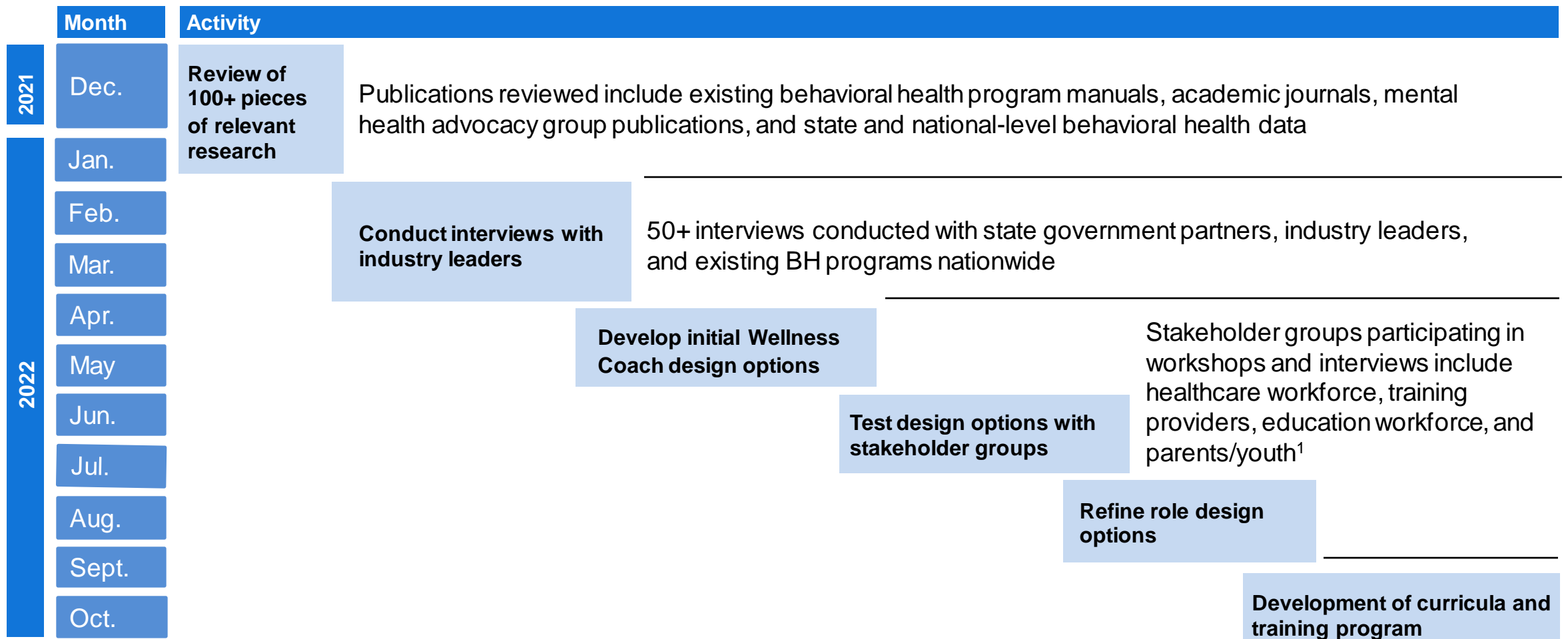


serve **vulnerable populations where they live, study, and work.**

Overview of Research Conducted to Date

The development of the Wellness Coach role was informed by a review of published behavioral health articles, stakeholder interviews, and stakeholder design workshops

Illustrative Timeline of Wellness Coach Development Process



1. Parent and youth engagement is ongoing.

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Overview of Wellness Coaches

Prerequisites to Enter Program



Education Program



Received Upon Completion



Services Offered



Wellness Coach I

- Near recent or recent high school graduates
- 60 credits of classroom education
- 400 hours of field practicum
- Associate's degree + Wellness Coach I certification
- Focus on education related to wellness promotion, life skills, and mental health literacy
- Provide limited individual and group support with a structured curriculum

Wellness Coach II

- Wellness Coach I certification or Associate's degree in related field
- 60 credits of classroom education
- 400 hours of field practicum
- Bachelor's degree + Wellness Coach II certification
- Focus on individual and group support related to wellness education, goal setting, life skills, and coping skills
- Perform the same core services as Wellness Coach I with additional expertise

All Wellness Coaches will:

- Serve children and youth aged 0 - 25
- Operate as part of a care team
- Offer 6 core services, including:
 - Wellness promotion and education
 - Screening
 - Care coordination
 - Individual support
 - Group support
 - Crisis referral
- Operate under the direction of and coordination with a PPS credentialed or licensed professional, depending on setting

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- **Scope of Services and Competencies**

- Recruitment and Training
- Operating Model
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Services and Competencies of Wellness Coach Roles

Services

Activities core to the Wellness Coach roles

- 1 Wellness promotion and education
- 2 Screening
- 3 Care coordination and extension
- 4 Individual support
- 5 Group support
- 6 Crisis referral

Additional Competencies

Demonstrated areas of knowledge to be evaluated against during on-the-job training

- 7 Cultural competency, humility, and mitigating implicit bias
- 8 Professionalism, ethics, and legal mandates
- 9 Communication
- 10 Operating in role and different environments

Scope of Services for Wellness Coach Roles (1 of 2)

Proposed Core Activity	Description of Potential Wellness Coach I Scope of Services <i>Under direction of PPS¹ or licensed professional</i>	Description of Potential Wellness Coach II Scope of Services <i>Under direction of PPS¹ or licensed professional</i>
1 Wellness Promotion and Education	<ul style="list-style-type: none"> • Deliver group or classroom programming (e.g., structured curriculum) focused on: <ul style="list-style-type: none"> • Wellness promotion and education (e.g., building positive relationships, bullying prevention, nutrition and exercise in relation to BH) • Mental health literacy (e.g., symptom recognition, help-seeking strategies, how to provide support) • Life skills (e.g., stress management, time management, problem solving) 	<ul style="list-style-type: none"> • Deliver group or classroom programming (e.g., structured curriculum) focused on activities listed in Wellness Coach I role and further programming on: <ul style="list-style-type: none"> • Coping skills (e.g., behavior activation, identifying thinking traps, distraction strategies, emotion regulation) • Facilitate surveys, focus groups, and interviews within organizations to identify needs for programming
2 Screening	<ul style="list-style-type: none"> • Support youth completing behavioral health screenings (e.g., answer questions, hand-off screenings to BH professionals) • Administer universal screening programs in school or other community-based organizations per SAMHSA guidelines • Identify and escalate BH needs of youth to BH providers in school or broader organization setting 	
3 Care Coordination and Extension	<ul style="list-style-type: none"> • Connect individuals to internal and external BH resources (e.g., local/regional/national organizations, school or broader organization resources, outpatient providers, residential programs, crisis response resources) as well as social services (e.g., food or housing programs) as needed • Facilitate communication with other professionals (e.g., BH providers, school personnel) that are providing support and care to youth, including connecting individuals to licensed providers so all care team members work together and operate at the top of their license or certification • Provide additional support to providers, school, or broader organization personnel, including BH related administrative activities (e.g., billing support) and extension of non-clinical or clinical BH support 	

Scope of Services for Wellness Coach Roles (2 of 2)

Proposed Core Activity	Description of Potential Wellness Coach I Scope of Services <i>Under direction of PPS¹ or licensed professional</i>	Description of Potential Wellness Coach II Scope of Services <i>Under direction of PPS¹ or licensed professional</i>
4 Individual Support	<ul style="list-style-type: none"> • Provide brief check-ins (~5-15 min) and scheduled meetings (~30 min) that provide emotional support and/or follow manualized curriculum that enhance wellness; individual support may include: <ul style="list-style-type: none"> • Wellness education (e.g., basics of BH symptoms, nutrition, and exercise in relation to BH) • Goal setting/planning (e.g., increasing movement, sleep hygiene) • Life skills (e.g., stress management, time management, problem solving) 	<ul style="list-style-type: none"> • Provide brief check-ins (~5-15 min) and scheduled meetings (~30 min) that provide emotional support and/or follow manualized curriculum that enhance wellness; individual support may include activities listed in Wellness Coach I role and: <ul style="list-style-type: none"> • Coping skills (e.g., behavior activation, identifying thinking traps, distraction strategies, emotion regulation) for youth
5 Group Support	<ul style="list-style-type: none"> • Deliver small group programming (e.g., structured curriculum) to enhance wellness and life skills (e.g., social-emotional skills, stress management, time management, organization, problem solving) 	<ul style="list-style-type: none"> • Deliver small group programming (e.g., structured curriculum) to enhance awareness of the most common BH conditions
6 Crisis Referral	<ul style="list-style-type: none"> • Adhere to a standardized protocol when responding to risk in the school or broader organization setting; identify potential risk and refer to the on-site BH provider, such as a PPS professional • Provide emotional support and engage in warm handoffs with on-site BH providers for youth that are waiting to be seen for crisis services 	

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Example Recruiting Considerations for Wellness Coach Roles

Recruiting Areas of Interest

Who

- **Diverse set of applicants** (e.g., age, race, ethnicity, LGBTQ+, languages spoken, socioeconomic status, experience type)
- **Experience with youth** (e.g., paraprofessional, classified school personnel) **or desire to work with youth**
- **Demonstrated competency in foundational skills and aptitudes** (e.g., written/oral communication, empathy, listening skills)
- **Applicants with a diverse range of educational backgrounds** (e.g., high school diploma, GED, Associate degree, Bachelor degree)

Where

- Geographic locations with **demonstrated shortages of mental health professionals**
 - Counties that have mental health professional shortage area (MHPSA) **scores of 16 or higher**¹
 - Counties that **do not have existing BH training programs**
- Areas with youth populations of diverse backgrounds and/or socioeconomically disadvantaged communities
 - Areas designated as **California Healthy Place Index (“HPI”) first and second quartile**

1. Mental HPSA Score was developed by the National Health Service Corps (NHSC) in determining priorities for the assignment of clinicians. The scores range from 0 to 26 where the higher the score, the greater the priority.

Example Wellness Coach Applicant Pipeline

Non-exhaustive



People who are currently working in healthcare or behavioral health
(e.g., community health workers and peer personnel)



People in unrelated entry-level roles that have a desire to work in behavioral health and/or with youth



People currently working in schools, such as paraprofessionals or administrative staff



Near recent or recent high school graduates with an interest in behavioral health



Individuals in colleges, either pursuing a degree or working on campus

Overview of Wellness Coach Training Program

	Pre-requisites for Program	Program Areas	Approx. Credits	Received Upon Completion
Wellness Coach I	None	General education	60	Associate's degree ¹ Wellness Coach I certification
		Introduction to behavioral health		
		Additional education		
		Field practicum		
Wellness Coach II	Associate's degree in related field OR Completed Wellness Coach I training	Wellness Coach I competency ²	n/a	Bachelor's degree ¹ Wellness Coach II certification
		Advanced behavioral health	60	
		Additional education		
		Field practicum		

1. Or credit towards further degree, if participant already has typical degree earned taking Wellness Coach I coaching-specific modules

2. Demonstrated via prior Wellness Coach I certification or via demonstrating competency or via

Training Program Structure: Wellness Coach I

	Program Area	Credits Earned ¹	Example Coursework & Program Content
Pre-program Education	General Education and Introduction to Behavioral Health	60 credits	<ul style="list-style-type: none"> • English composition (e.g., oral communication, written communication) • Critical thinking • Introduction to psychology • Introduction to social work • Introduction to human behavior • Child & adolescent development • Statistics
Classroom	Additional Education <i>(includes didactics & experiential learning to ensure individuals have the skills, knowledge, & abilities to be workforce ready)</i>		<ul style="list-style-type: none"> • Wellness promotion / education • Screening • Communication • Care coordination and extension • Coaching and counseling frameworks² • Reflective practice (e.g., self-care, self-awareness) • Documentation basics • Crisis management • Cultural competence / humility & implicit bias • Social determinants of health • Professionalism, ethics, legal mandates • Operating in different environments • Disability approaches I • Substance use disorder I
Field Work	Field Practicum		<ul style="list-style-type: none"> • 400 hours of supervised experience including direct services, supervision, other clinical related activities, and competency evaluations⁴
Certification			<ul style="list-style-type: none"> • Apply for and maintain certification through external organization after graduating program. Recertification to be completed every two (2) years

1. Credits from other programs can be transferred if they meet the training institution's requirements. 2. Includes, but not limited to, social emotional learning, active listening, relationship building, creating affirming environments, coaching practice in live settings. 3. Includes, but not limited to, focus on people of color, immigrant, LGBTQ+, Native, limited English proficiency populations. 4. Hours from related experience can be transferred if they meet the supervisor's requirements.

Training Program Structure: Wellness Coach II

	Program Area	Credits Earned ¹	Example Coursework & Program Content
Pre-program Training	Wellness Coach I Competency	n/a	No additional coursework required
	Advanced Behavioral Health	60 credits	<ul style="list-style-type: none"> • Counseling principles • Lifespan development • Abnormal psychology • Child and family welfare • Social determinants of health
Classroom	Additional Education <i>(includes didactics & experiential learning to ensure individuals have the skills, knowledge, & abilities to be workforce ready)</i>		<ul style="list-style-type: none"> • Advanced evidence-based practices (e.g., CBT, motivational interviewing, trauma-informed care) for individual and group support • Supervision • Advanced crisis management / suicide prevention² • Reflective practice (e.g., self-care, self-awareness) • Secondary trauma / trauma-informed care • Neurodivergence • Disability approaches II • Substance use disorder II
Field Work	Field Practicum		<ul style="list-style-type: none"> • 400 hours of supervised experience including direct services, supervision, other clinical related activities, and competency evaluations³
Certification			<ul style="list-style-type: none"> • Apply for and maintain certification through external organization after graduating program. Recertification to be completed every two (2) years

1. Credits from other programs can be transferred if they meet the training institution's requirements 2. Includes training in suicide impact assessments. 3. Hours from related experience can be transferred if they meet the supervisor's requirements.

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- **Operating Model**
- Career Lattice

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Example Guiding Principles & Activities for Wellness Coaches

		Example Activities Related to Wellness Coach Roles	
Example Guiding Principles	In scope	Out of Scope	
 Prioritize BH-related Support	Individual and group support for students with behavioral concerns	Assessing, diagnosing, or providing clinical intervention or treatment	
	Understanding how academic advising services are provided to best support youth	Providing academic advising services	
	Facilitating promotion/prevention programming, which can include health education related to BH	Facilitating system-level programming or creating specialized curricula	
 Prioritize BH-related Administrative Support	Documenting activities related to BH individual and group support	Documenting activities related to student enrollment	
	Scheduling BH-related appointments	Developing or administering the master schedule; scheduling academic advising appointments	
	Utilizing broad BH screening tools and managing database	Administering academic state or interim assessments	
 Prioritize BH-related Care Coordination	Connecting individuals to BH support resources (e.g., outpatient therapy, support groups) and social services as needed	Providing medical referrals (e.g., ENT, PCP)	
	Coordinating with other BH providers , including around the provision of BH services, to students with IEPs	Administering and coordinating individual education plans (“IEP”)	

Example Sites for Wellness Coach Services

Applies across ages


Example site	Early childhood ¹	Elementary school ²	Middle and high school ³	Transition aged ⁴
Schools	<ul style="list-style-type: none"> Preschool programs Head start 	<ul style="list-style-type: none"> Primary school campus 	<ul style="list-style-type: none"> High school campus 	<ul style="list-style-type: none"> Community colleges Four year colleges
Community-based Organizations	<ul style="list-style-type: none"> Community centers 	<ul style="list-style-type: none"> YMCA Boys and Girls Club Community centers 	<ul style="list-style-type: none"> Community centers After-school programs 	<ul style="list-style-type: none"> Community centers Mobile crisis
Health Centers	<ul style="list-style-type: none"> Primary care Tribal health programs 	<ul style="list-style-type: none"> Primary care clinics Tribal health programs Hospital specialty clinics Residential treatment centers Partial hospitalization programs Crisis service providers Federally qualified health centers Rural health clinics School health centers 		
Government	<ul style="list-style-type: none"> Childcare and development programs AIMSS⁵ 	<ul style="list-style-type: none"> Juvenile justice Homeless service providers Foster care service providers Home-based & home-visiting programs 		
Telehealth	<ul style="list-style-type: none"> Technology/telecommunication solutions to support specific groups (e.g., rural areas, foster care system) After-hours services and easy-to-reach services for all groups DHCS Platform 			

1. Ages 0-5. 2. Elementary schools with children aged 6-12. 3. Public middle and high schools with youth aged 13-18.
4. Ages 18-25. 5. American Indian Maternal Support Services.

Example Criteria for Sites

- **Sites that have direct youth engagement** (e.g., elementary schools, middle schools, and high schools).
- Sites that **promote sustainable impact**, including those that:
 - **Youth frequently occupy**, would want to try behavioral health services, and/or **trust the current services and individuals**
 - **Value coach services** and offer continued mentorship and professional development
 - **Employ staff knowledgeable about behavioral health services** and motivated to integrate coaches
- Consider sites that **promote feasibility**, including those that:
 - Serve youth with **needs that are appropriate for coaches' level of education and training**
 - **Offer infrastructure that supports scalability** (e.g., telehealth)

Example Model for Wellness Coach Supervision

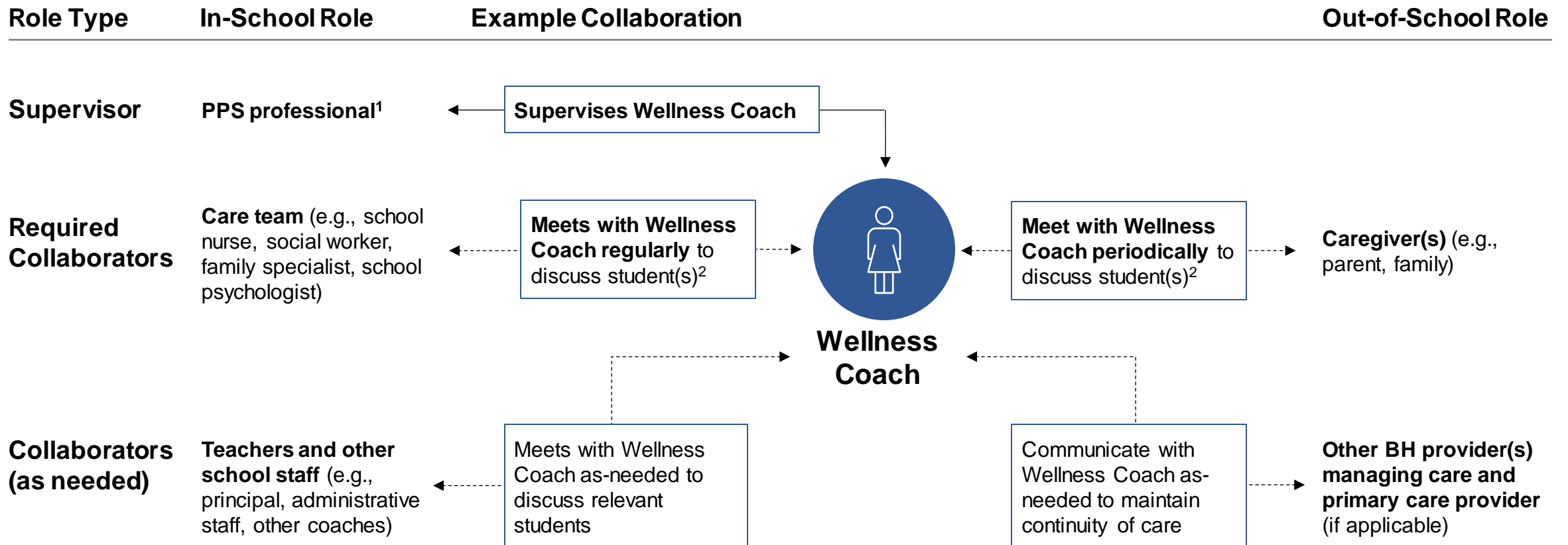
 Supervision model based on stakeholder input

Area	Example Model Options More than one option may be appropriate depending on the circumstances	Considerations
Number of Individuals	<div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid black; padding: 10px; text-align: center;"> Individual (One-to-one supervision) </div> <div style="background-color: #4a7ebb; color: white; padding: 10px; text-align: center;"> Small groups (Example: 4 coaches to 1 supervisor) </div> </div>	One-on-one supervision may require more time from the supervisor , particularly if they are responsible for multiple coaches
Supervision Cadence Options	<div style="display: flex; justify-content: space-around;"> <div style="border: 1px solid black; padding: 10px; text-align: center;"> Supervisor in all interactions </div> <div style="border: 1px solid black; padding: 10px; text-align: center;"> Daily touchpoints¹ </div> <div style="background-color: #4a7ebb; color: white; padding: 10px; text-align: center;"> Weekly touchpoints² </div> <div style="background-color: #4a7ebb; color: white; padding: 10px; text-align: center;"> As-needed touchpoints </div> </div>	A licensing board may require supervisors to oversee a particular percentage of accrued clinical hours for a Wellness Coach
Supervisor Type	<div style="display: flex; justify-content: space-around;"> <div style="background-color: #4a7ebb; color: white; padding: 10px; text-align: center;"> Pupil Personnel Services (PPS)³ </div> <div style="background-color: #4a7ebb; color: white; padding: 10px; text-align: center;"> Licensed BH provider⁴ </div> </div>	Licensing boards may have pre-determined supervision formats Supervisor availability may vary
Other Considerations	<p>Supervisor qualifications (e.g., years post licensure) and competencies (e.g., cultural competence, anti-discrimination practices) may vary</p> <p>There may be clinical record-keeping laws required of the supervisee (Wellness Coach) (e.g., what information should be included in the record, how long records should be maintained)</p> <p>There may be documentation requirements for supervisory activities (e.g., discussion of client progress and changes in treatment plan)</p> <p>Supervisors may be required to be employed by a particular agency/practice</p>	

1. Scheduled daily meetings for ~15-20 minutes for less advanced Wellness Coaches 2. Scheduled weekly meetings for ~30-45 minutes 3. In school settings 4. In community settings

School Settings: Example BH-related Activities by Role Type

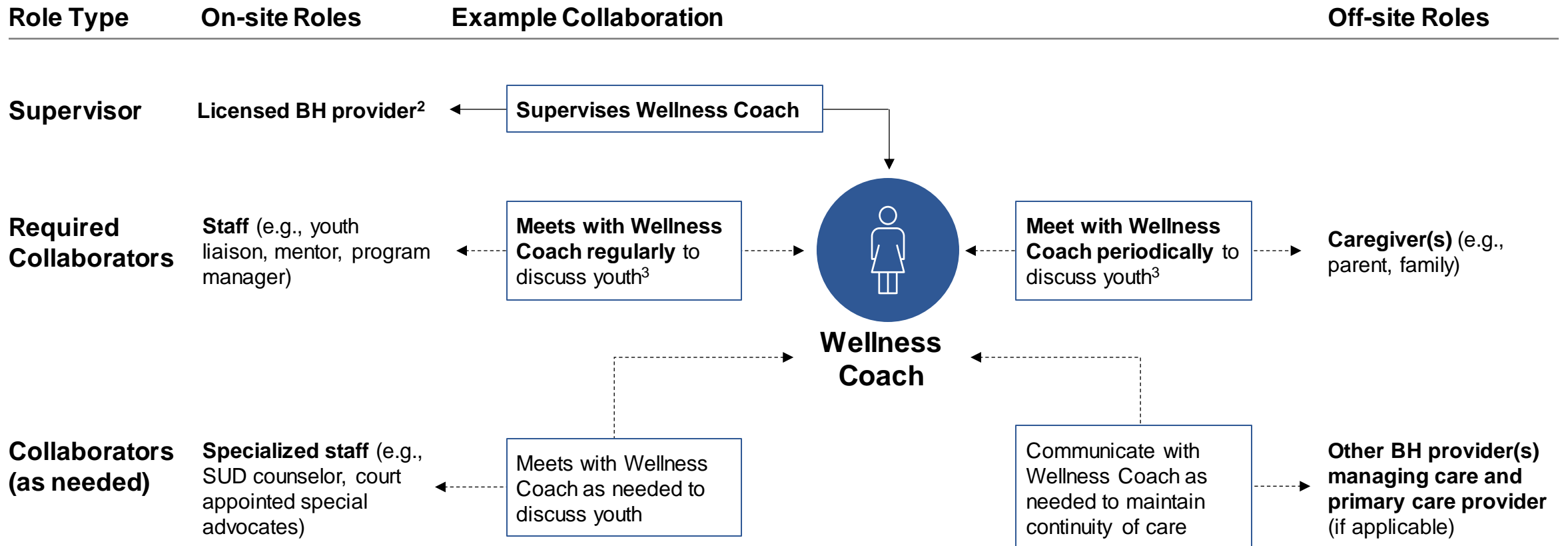
— Supervisory relationship - - - - Informal relationship



1. Includes licensed and unlicensed PPS professionals. Supervisor or members of care team may allocate time to several schools throughout the district and may not always be on-site. 2. Student(s) include those under the care of the care team or caregiver, only with appropriate permissions.

Community Settings¹: Example BH-related Activities by Role Type

— Supervised relationship - - - - Informal relationship



1. Settings may include health clinics, community-based organizations, community centers, etc. 2. Supervisor and members of care team may allocate time to several sites and not always be on site or may not exist by setting. 3. Youth include those under the care of the care team or caregiver, only with appropriate permissions.

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Example Behavioral Health Career Lattice

Minimum Education Level Required ¹		Illustrative Behavioral Health Lattice with Example Behavioral Health Roles						
Supervised Professional	Certificate	Other non-BH roles		Community health worker		Peer support ²	SUD counselor	
	Associates	Wellness Coach I						
	Bachelors	Wellness Coach II		Social worker				
	Masters	School counselor (incl. PPS ³)	School psychologist (incl. PPS ³)	Social worker (incl. PPS ³)	Practicing therapist or counselor working towards licensure	Other supervised BH roles ⁴		
Independent Practitioner	Licensure	Licensed clinical social worker (incl. PPS ³)	Licensed educational psychologists (incl. PPS ³)	Licensed marriage and family therapist (incl. PPS ³)	Licensed professional clinical counselor (incl. PPS ³)	Licensed school nurse (incl. PPS ³)		
	PhD	Psychologist (incl. PPS ³)						
	MD	Psychiatrist, primary care providers						

Select Observations

- The Wellness Coach role is designed to be an additional opportunity in the ladder, bridging the gap between roles with minimum to no training to Master’s level training
- The Wellness Coach role offers employment and training benefits to those that want to advance their careers to higher levels of the career lattice.

1. Or degree equivalent 2. Includes peer support roles (e.g., peer specialist, family support specialist, recovery coach, peer navigators)
 3. Pupil Personnel Services 4. Examples include organizational psychology, behavioral analysis, physician assistant, and others

Illustrative Scope of Practice for Select Non-Clinical BH Professionals

Role	Description of Scope of Practice
Wellness Coach I and II	Support non-clinical behavioral health needs of children and youth (ages 0 – 25) , with a focus on wellness promotion and preventative services
Peer Support Specialist	Peer Support Specialists provide recovery-oriented, culturally appropriate services that promote engagement, socialization, self-sufficiency, self-advocacy, natural supports and are trauma aware (source: CalMHSA)
Community Health Worker	Serve as a link between health and social services and the community to increase access to and improve the quality of services (source: CHCF)
Bachelor's-level Social Worker	Prepares individuals for generalist practice positions (such as casework), where they engage with clients (e.g., individuals, families, communities), assess their needs, link them to services, and monitor their progress (source: CSWE)

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Marketing

Partnered with marketing and communications vendor to develop state-wide awareness campaign

Certification

Developing certification process to certify Wellness Coaches through HCAI

Curriculum & Training

Working with external partners to develop curriculum and training program

Funding

Partnering with Department of Health Care Services and Department of Managed Health Care to develop funding opportunities to create sustainability within the profession