



Wellness Coach Profession

Department of Health Care Access and Information (HCAI)
February 15, 2023



The **HCAi** Vision

Every Californian should have access to equitable, affordable, quality health care provided in a safe environment by a diverse workforce — guided by health information that improves outcomes for all.



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 (WC) workforce.**



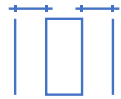
The WC role is designed to...



increase overall capacity.



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



fill some of the **workforce gaps** that exist today.



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

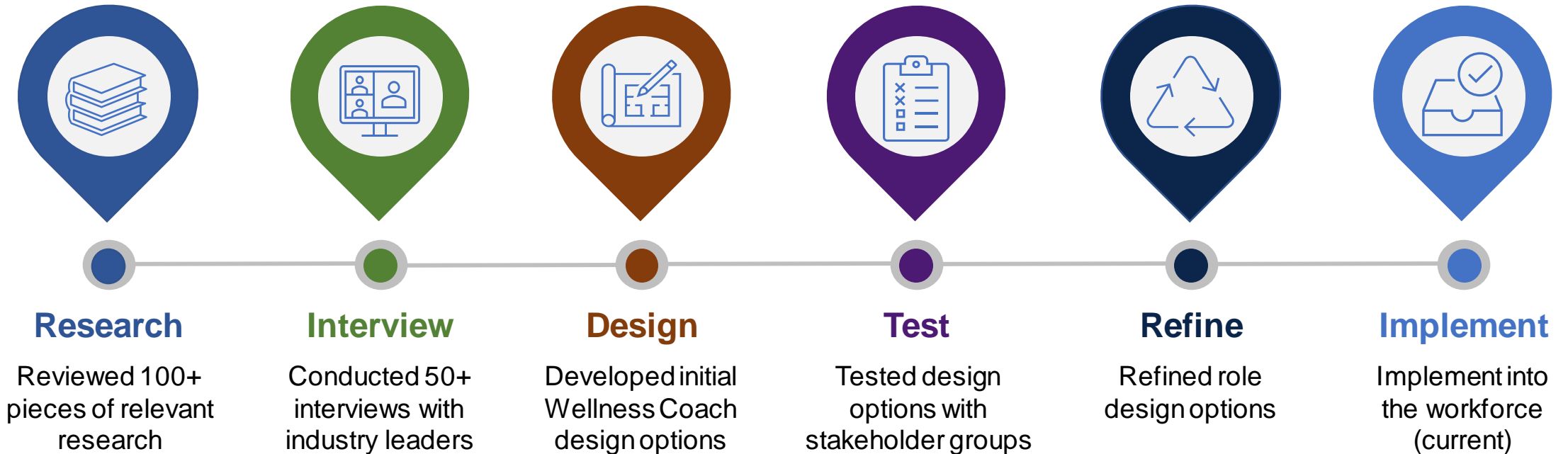


engage directly with youth (aged 0 – 25).



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

How the role was developed...



Behavioral Health Career Lattice

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

Select Observations

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

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

Program Structure: Wellness Coach I

	Program Area	Credits Earned ¹	Example Coursework & Program Content
Pre-program Education	General Education and Introduction to Behavioral Health	32 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>	20 credits	<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	8 credits	<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.

Services and Competencies

Services

Activities core to the Wellness Coach roles

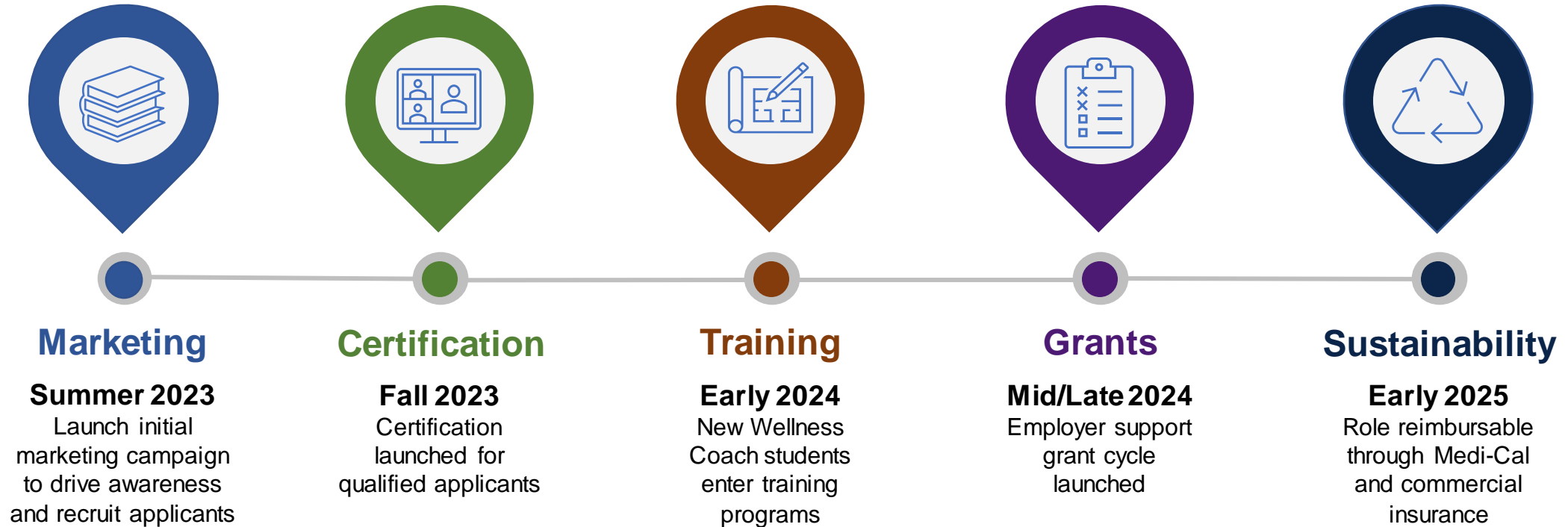
- 1 Wellness promotion and education
- 2 Screening
- 3 Care coordination and extension
- 4 Individual support
- 5 Group support
- 6 Crisis referral

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

Multi-Year Timeline



Wellness Coach Certificate: Goals & Objectives

Customization

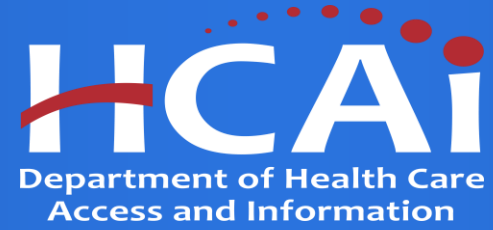
Blend **pre-existing courses** (e.g., social work, psychology, child development) with a **focus on field experience** and **experiential learning** to create custom Wellness Coach certificate

Stackability

Structure certificate so students are on track to complete **AA-T degree in related field** (i.e., social work, psychology)

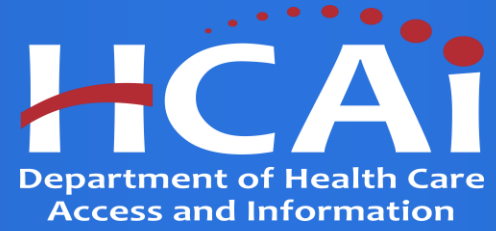
Workforce Readiness

Ensure students leave with competencies and skillset to be **employed as Wellness Coaches** and/or **continue on to more advanced degrees**



Thank You!

Have questions or comments? Email CYBHI@hcai.ca.gov

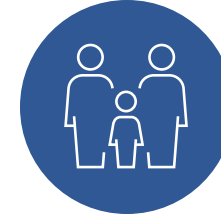


Appendix

Example Wellness Coach Applicant Pipeline



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




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 	

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”)	