Ortho-Bionomy®

Society of Ortho-Bionomy International® Advisor Guidelines

Table of Contents

Many thanks go to Marla Moore, Ursula Hofer, Richard Valasek, David Clayton and Karen Sonter for their input into these notes.

The Vision of the Society of Ortho-Bionomy International®:
That everyone, everywhere, experience the mood, the laws of life, that Arthur Lincoln Pauls called Ortho-Bionomy®.

Arthur's Vision: ***"An Ortho-Bionomist in every family."***
And to embody the philosophy of the 'Evolvement of the Original Concept.'

Our Mission:

The Mission of the Society is to promote the practice of Ortho-Bionomy and to support the evolvement of Ortho-Bionomy in accordance with its own philosophy and principles.

Specifically:

• To conduct all Society business with awareness of Ortho-Bionomy's philosophy, in a sustainable and inclusive fashion.
• To set standards for Professional Training Programs.
• To regulate the registration of Practitioners and Instructors.
• To promote public education and awareness of Ortho-Bionomy.
• To provide professional services and support for Society members.
• To maintain the integrity of Ortho-Bionomy by ensuring compliance with the Trademark Policy and Code of Ethics.

Principles

Non-Judgment	Going with the flow
Self Recognition	Be present for others
Structure Governs Function …. and Function Governs Structure	Honor what arises
Working "with" vs. Working "on"	Less is More
Going with ease of movement	Meeting in right relationship /Where people are
Exaggerate the pattern	Interruption of pattern

An Advisor will need to enact Dr. Arthur Lincoln Pauls' vision and keep it utmost in his/her mind as his/her Ortho-Bionomy vision of **'an Ortho-Bionomist in every family'.** This vision will be evident in their informal and formal advisory roles with clients, students, Practitioner Trainees, Advanced Practitioner Trainees, Instructor and Advanced Instructor Trainees.

Section 1 The Policy

Excerpt from The Society of Ortho-Bionomy International Policy

- **Instructor Advisor Guidelines and Responsibilities**
  - Advisor is Instructor with two years active teaching
  - is responsible to review and confirm Curriculum's requirements have been met at each level of application and training
  - will review and confirm paperwork is in order for Trainee at each level
  - mentors and supports Trainee through their program, benching and co-teaching when possible
  - recommends Trainee to apply for Instructor Training Program
  - confirms Trainee co-teaches or benches with at least two Instructors
  - recommends applicant to evolve to Associate Instructor
  - confirms Supervised Teach is clearly identified as a Supervised Teach
  - work with Associate Instructor to get live Supervised Teach
  - if live Supervised Teach is not possible, will work with IRC and Associate Instructor to confirm if video-taped Supervised Teach will be allowed
  - recommends Associate Instructor evolvement to Instructor.
  - Will be the contact for Instructor Review Committee or Board for applicant if there are questions.

- **Advanced Instructor Advisor Guidelines and Responsibilities**
  - Advisor is an Advanced Instructor
  - Responsible for review and understanding of the Advanced Instructor Training Program
  - Responsible to review and confirm Curriculum's requirements have been met at each level of application and training
  - Review and confirm paperwork is in order for the Trainee at each level
  - Mentor and support Trainee through the Training Program, benching and co-teaching when possible
  - Recommends Trainee to apply for Advanced Instructor Training Program
  - Confirms Trainee co-teaches or benches with at least two instructors
  - Recommends applicant to evolve to Associate Advanced Instructor
  - Confirms Supervised Teach is clearly identified as a Supervised Teach
  - Work with Associate Advanced Instructor to get Supervised Teach
  - Recommends Associate Advanced Instructor evolvement to Advanced Instructor
  - Receives copy of Trainee's application and training portfolios throughout the process
  - Will be contact for Instructor Review Committee or Board for applicant if there are questions.

Section 2 Associate Practitioner, Practitioner and Advanced Practitioner Training Program

Excerpts from the Practitioner Training Program and the Advanced Practitioner Training Program Defining the Role of an Advisor. ***Taken from the Practitioner Training Program Handbook p.4-5***

Choosing Your Advisor: An integral part of the Registered Practitioner Training is the guidance, support, and feedback received from an advisor. Although it is strongly recommended that you experience working with as many Registered Instructors, Registered Practitioners and peers as possible, the relationship you have with your advisor is unique. S/he will be working specifically with you as you progress in your training. It is not necessary to choose an advisor prior to formally enrolling in the training program. Classes taken from a Registered Instructor prior to enrollment in the program count toward fulfillment of Program requirements. It is strongly suggested that you choose an advisor before completing your first 100 hours of the program.

The following are some tips and guidelines for selecting and working with an advisor:

- Can the Instructor clearly articulate what s/he requires from advisees?
- Can the Instructor talk in detail about how s/he views his/her role as advisor?
- Do you feel that you will get the time and attention that you need from the Instructor? Be direct and ask for what you envision or ask the Instructor in what ways s/he is available outside of class for his/her students.
- What are the Instructor’s fees for Feedback Sessions, Consultations, and Evaluation Sessions?
- Does s/he have a written contract? Not all Instructors have a contract but s/he should be able to talk in detail about what they expect from a student.
- Talk with several Instructors before choosing an advisor. This is a relationship in which you, as the student, will need to be supported and guided. Find an Instructor who matches your needs and at the same time will challenge you to continue to grow.

Advisor Eligibility: A Registered Associate Instructor, Instructor, Advanced Instructor. An advisor must be actively involved with Ortho-Bionomy through teaching and/or seeing clients. Choose the person who will provide you with the best guidance in your training.

Agreement: Talk with the advisor of your choice to discuss expectations. Specify what you expect from an advisor and hear what s/he expects her/his role to be. When you come to an understanding that is clear for both of you, put your agreement in writing. You will have your agreement to refer back to if necessary.

On-going Relationship: Becoming a Registered Practitioner of Ortho-Bionomy is an on-going process. It is both a personal process and a process of coming to understand the work and how to utilize it. Maintaining ongoing communication with your advisor is an invaluable aid in moving along in your process. Together you can establish your own mixture of pre-arranged meetings/sessions and more informal talks and ways to check in.

Your advisor does not need to be local. With video conferencing, phone and other technological advances, many of your mentorship units can be done in a variety of ways.

You may want to be able to see your advisor in person for feedback & evaluation sessions, so if your advisor does not travel to teach in your area, you may need to travel to a class of theirs or plan to meet at the SOBI Conference.

Sessions for feedback with your advisor, having one-on-one discussion in person or by telephone/technology, or having him/her observe your work with clients, are three examples of excellent ways for your advisor to get a sense of where you are in your journey, so s/he can best guide and support your continued growth.

It is a good idea to plan together how and when you will stay in contact as part of your initial agreements.

Be clear with your advisor if and where a fee is appropriate in exchange for her/his time.

Associate Member Section of the Practitioner Training Program

The Associate Training Program is 114 units of the 500+ unit Practitioner Training Program. Completion of the Associate Training Program is acknowledgement of a milestone in the student's Practitioner Training. It includes:

- 112 classroom units of Ortho-Bionomy instruction in Phase 4, Phase 5 and Phase 6, Ethics & Emotions and electives
- 2 units of mentorship time, including 1 Feedback Session with a Registered Instructor & 1 Session received from a Professional Member

For Associate Membership - Associate Member Form (below) completed, signed by an Instructor and sent to the Society office for approval with applicable fees.

- Associate Member Form and Practitioner Training Application

Ortho-Bionomy Associate Membership Evolvement Form

Below are the only sections that an Instructor needs to sign but not as an Advisor. Sign tutorial or if they choose to take an 8 or 16 unit class.

Ethics Requirement: (3, 8 or 16 units) include the option you choose and have instructor sign
__Tutorial Option: 3 units Associate Ethics Tutorial (this transfers to a study group on the Practitioner Training Program), trainee will complete additional 45 class/elective units to complete the 114 unit Associate program.   Tutorial

____

Instructor Signature   Date

__ Class Option: 8 or 16 units Ethics & Emotional Issues Course, trainee will complete additional 40 or 32 class/elective units to complete the 114 unit Associate program.

Ethics Class ___________ ________ ____________________
Class Date Unit Instructor Signature
Instructor Recommendation:
I (Registered Instructor) have received a satisfactory feedback session from the Associate member trainee listed above and find that s/he has a competent understanding of Ortho-Bionomy to evolve to Associate member.

Taken from the Advanced Practitioner Training Handbook p.3

Choosing Your Advisor: An integral part of the Registered Advanced Practitioner Training is the guidance, support, and feedback received from your program advisor. Although it is strongly recommended that you experience working with as many Registered Instructors, Registered Advanced Practitioners and students as possible, the relationship you have with your advisor is unique. S/he will be working specifically with you as you progress in your training. It is necessary to choose an advisor prior to enrolling in the training program. You may begin taking classes and filling out your program record form immediately. It is strongly suggested that you choose an advisor before completing the first one hundred hours of the program. As soon as you have an Advisor you may send in your Application to enroll in the Advanced Practitioner Training Program to the Society Office.

The following are some tips and guidelines for selecting and working with an advisor:

Can the Instructor clearly articulate what they require from the students whom they advise?

Can the Instructor talk in detail about how they view their role as advisor?

Do you feel that you will get the time and attention that you need from the Instructor? Be direct and ask for what you envision or ask the Instructor in what ways they are available outside of class for their students.

What are the Instructor’s fees for Feedback Sessions, Private Discussions, and Evaluation Sessions? Does the Instructor have a written contract? Not all Instructors have a contract, but they should be able to talk in detail about what they expect from a student.

Talk with several Instructors before choosing an advisor. This is a relationship in which you, as the student, will need to be supported and guided. Find an Instructor who matches your needs and at the same time will challenge you to continue to grow.

Advisor Eligibility: An Advisor for the Advanced Practitioner Training Program must be a Registered Associate through Advanced Instructor.

Agreement: Talk with the Advisor of your choice to discuss expectations. Specify what you expect from an advisor and hear what s/he expects her/his role to be. When you come to an understanding that is clear for both of you, put your agreement in writing. You will have your agreement to refer back to, if necessary.

On-going Relationship: Becoming a Registered Advanced Practitioner of Ortho-Bionomy is an on-going process. It is both a personal process and a process of coming to understand the work and how to utilize it. Maintaining on-going communication with your advisor is an invaluable aid in moving along in your process. Together you can establish your own mixture of pre-arranged meetings/sessions and more informal talks and ways to check in. Doing sessions for feedback with your advisor, having him/her observe your work with clients, having one on one discussions in person or by telephone are all excellent ways for your advisor to get a sense of where you are in your training and to guide you in your training. It is a good idea to plan together how and when you will stay in contact as part of your initial agreements. Be clear with your advisor if and where a fee is appropriate in exchange for her/his time.

Section 3 Instructor and Advanced Instructor Training Program

From the Instructor Training Handbook Please see ** for any mentions of an Advisor

p. 3 **5. A trainee must pick an Advisor to oversee their training experience as soon as possible but at least by the time of the 3rd bench assist.

p. 5 Application to Instructor Training Program (Page 2) Applicant Essay Questions

Question 7. Describe the roles and responsibilities of an Advisor.

p. 39 Becoming an Associate Instructor

1. See checklist on page two of the Instructor Training Program Handbook

2. Trainee must be approved as a Registered Advanced Practitioner

3. Trainee must have completed ITS I

** 4. Trainee must have completed bench assists and bench assists with classroom demonstrations as required by their Advisor and trainers. A minimum of 3 of the bench assists must include demonstrations.

**5. Trainees must be recommended to become Associate Instructors by the Advisor and another registered instructor in good standing with whom s/he has benched.

** 6. All application materials are submitted to IRC quarterly. The SOBI Office will notify the trainee and his/her Advisor of the trainee's appointment as an Associate Instructor or a requirement for further training prior to the next quarterly IRC meeting.

7. Once approved, Associate Instructors may teach study groups

Note: Trainee may not co-teach prior to appointment by the IRC to Associate Instructor.

p. 39 Final Appointment to Instructor See **

**1. It is the responsibility of the Advisor to review and confirm that the curriculum's requirements have been met before recommending an Associate Instructor evolvement to Instructor.

**2. The Associate Instructor must complete the training requirements, forms, and written recommendations (one from Advisor and one from a SOBI registered instructor with whom you've done classroom training) and submit all documentation to the SOBI Office.

3. Please note that any publicity for the supervised teach must clearly identify it as a supervised teach and not present the candidate as an Instructor. A supervised teach must be in person. Video-taped supervised teaches are only allowed under rigorously defined conditions. Please contact office for description if needed.

4. The IRC will examine and assess the information contained in the trainees file

A completed file will include:

- Instructor Training Program Record Form
- All completed Evaluation Forms for each bench assist, co-teach, and supervised teach. It is required to co-teach or bench with at least two instructors.

** Recommendation forms from 2 registered SOBI Instructors in good standing with whom you have worked in your training, preferably from Instructors with whom you have co-taught or done a supervised teach. One of the recommendations must be from your Advisor.

- Completed Instructor Training Program Agreement
- Letter requesting evolvement to Instructor. The IRC will verify the completeness of the file, and also conduct a qualitative examination of the records. It will review the recommendations, evaluations of the trainee, the trainee's self-evaluations and other parts of the application and records to indicate the readiness of the candidate to become an Instructor. On occasion, the IRC may also request and consider collateral information from Instructors who have worked with or taught the candidate that may be relevant when the IRC is making a decision. The Instructor Review Committee will recommend appointment of the applicant as Instructor, or additional requirements for the candidate to the Board of Directors.

5. Final appointment to Instructor will be made by the Board of Directors of the Society of Ortho-Bionomy upon recommendation by the IRC.

6. It is recommended that all new Instructors send a letter of self-introduction to the entire Instructor community announcing their evolvement as an Instructor.

p. 40 ** Advisors' Support Crucial for Applicants: Please confirm the applicant's packet includes a cover letter with the applicant's name as the trainee would want it on a certificate, applicants email, phone and name and your name, phone and email as their advisor. This speeds up the process if the committee or staff has a question on a portfolio. Please help the trainee confirm that their packet is complete.

Advisor Signature Required

From Advanced Instructor Training Program

***p. 3* Notes for both Phase 5 and Phase 6 training *:**

Self-assessment by candidate and assessment by Advisors & Supervising Instructors happens throughout program and is documented in applications and on bench assist, co-teach and supervised teach forms. This gives the candidate several opportunities for feedback and evaluation.

These are meant to be minimum guidelines with the actual process to be decided by the trainers and the advisors. The timeline may overlap as Phase 6 classes come up between Phase 5 co-/ or supervised teaches. With advisor permission, a trainee can begin their Phase 6 co-teach after they have completed and submitted their Phase 5 Evolvement Documentation.

All above coursework is based on 16 or more unit classes. Classes under 16 units that a trainee may choose to participate in are considered additional coursework beyond the minimums above. Trainee's advisors may require more than the stated minimums. Residentials will be counted as one experience rather than two or three classes.

During the Supervised Teach, the Trainee is responsible for every aspect of the class. The Advanced Instructor supervising will be completely in the role of observing the Trainee's teaching and will be evaluating the Trainee's performance for recommendation either for evolvement or to undertake an additional supervised teach.

p.6 **ADVISOR STATEMENT**

We submit that our advisee is eligible and prepared for Advanced Instructor training and his/her forms are complete. We have discussed the training process with the Trainee and contract to serve as his/her Advisors throughout his/her training process.

1) Program Advisor ____

Signature ____

2) Program Advisor ____

Signature ____

Advanced Instructor Training Program Enrollment Fee: $100.00

Please make your check or money order payable to SOBI (U.S. Dollars). Please do not send cash. You may also pay on the SOBI website via Paypal, Visa or MasterCard.

Needs Advisor Signature

Application to Enter Advanced Instructor Training Program p. 6

Program Agreement Form Phase 5 p. 11

Program Agreement Form Phase 6 p. 12

Trainee Self-Evaluation Form p. 13

Trainee Self-Evaluation Guidelines For Reflection p. 14

Instructor Evaluation Form p.15

Evolvement to Associate Advanced Instructor Request Form p. 16

Evolvement to Advanced Instructor Request Form p. 18

Recommendation Form for Evolvement to Advanced Instructor p. 19

Section 4 The Role of the Advisor and the Trainee/Advisor Relationship

1. Enrolling in the Practitioner Training Program and choosing an Advisor

Every Instructor is an Advisor to all trainees whether or not they are in the specific role of the Advisor or not. This means that all Instructors have a responsibility to all trainees who choose to work with us to give them the best and most relevant advice. All Instructors need to be committed in assisting every trainee to the work effortlessly through the Training Program following the principles of Ortho-Bionomy.

Ortho-Bionomy has created a unique structure in which trainees learn. Ortho-Bionomy trainees have many choices: they can take a few classes, they can become a general member, or they can do the Practitioner Training Program.

Often trainees don't know immediately what they want to do. It helps to spend some time in each class, talking about the different options, as well as the benefit of the Practitioner Training Program (PTP) is helpful.

The Benefits of being in the Practitioner Training Program Taken from the SOBI web-site

Training Programs

The Society has developed and oversees professional training programs for Ortho-Bionomy® Practitioners -- the Registered Practitioner Program and the Registered Advanced Practitioner Program. Both programs are designed to give students a thorough understanding of the principles and philosophy of Ortho-Bionomy in addition to providing extensive hands-on experience in both classes and supervised practice. Trainees choose an Instructor or Practitioner as an advisor during their training. The advisor assists the student while they complete their curriculum through one-on-one discussions as well as feedback and evaluation sessions.

Unlike a school setting, trainees choose the pace they wish to complete a program. They can complete the program in a short time, or slowly complete the training over years. They can take their classes in a variety of locations and with a variety of Registered Instructors. A sixteen unit or weekend class cost ranges from $250 - $400, depending on the costs to host a class in that location.

In general, Advisors encourage trainees to enroll in the PTP when they have done about one hundred hours of studies. This gives them a sufficient introduction to Ortho-Bionomy while at the same time, they still have a lot of time to be a trainee.

Whether the trainee enrolls or not, encourage them to keep track of their classes on the Practitioner Training Program Registration. The Advisor/Instructor could hand a copy of the PTP to the Trainee. The forms are available on the SOBI web site: http://www.ortho-bionomy.org/Training/Training.aspx

2. Role and Responsibilities of the Advisor:

A. Role of the Advisor

Explain your role as the Advisor. Be clear in which ways you can be available for the trainees. Different expectations get projected onto the role of the Advisor. Many Instructors have developed a questionnaire for the interested student to fill out. (See Appendix One).

B. Responsibilities of an Advisor

1. Initially it is important to clarify:

- How the PTP is structured and how to proceed.
- How the role of the Advisor is different from the roles of the other Instructors.
- the fees expected
- Expectations of *mutual* support and collaboration
- Expectations of what classes of the Advisor's, the trainee wants to attend, feedback and evaluation sessions, tutorials, study groups, etc.
- On completion of the Training Program the Advisor is required to sign the trainee's paperwork. At this point, it is important to take the time to go through the paperwork with the trainee to ensure it is complete before the trainee submits it to the PRC.

2. The accountability of an Advisor:

When working with trainees, Advisors need to carefully read and have complete knowledge of the:

- Associate Practitioner,
- Practitioner and
- Advanced Practitioner Training Program requirements and
- The Policy on the SOBI web-site

It is part of the Agreement between Instructors and SOBI and is signed annually.

Advisors need to know how to access all of the SOBI training programs and policies; these **should be reviewed annually** by the Instructor/Advisor t**o keep up-to-date with any changes that have occurred.**

C Some trainees will want to work with two Advisors. It is up to the two Instructors/Advisors to agree and make a choice about whether to work with the trainee's together. For some trainees, having two Advisors works very well, however, with other trainees, working with more than one Advisor can lead to avoiding clear communication with each Advisor and gaining different information from each Advisor.

D **The learning experience of the trainee**

When Advisors are working with Trainees, they may want to request the Trainee to have a learning journal so the Trainee can track their own learning across the Practitioner Training Program. This way, the trainee can see how they have improved in their skills over time. The trainee can even record articles or books that they have read or something an Instructor or someone said that may be some effect or impact on their training.

Advisors may want to use a method called "Radical Affirmation" where the Instructor/Advisor only gives the Trainee positive feedback on their work and allows the trainee to reflect on any issues or weaknesses themselves. This idea sits well with the principles and practices of Ortho-Bionomy as trainees will be able to self-evaluate, self-reflect and self-correct.

Remember, just like our clients, every trainee is different. Therefore, every trainee's learning experience will be different and their training will need to be tailored just for the trainee. The trainee's development along the path and pacing along the spiral of their evolution into Ortho-Bionomy Practitioners and Advanced Practitioners will be unique.

E ***At any time, trainees are able to change Advisors – if this occurs, they need to notify the SOBI Office.***

F Some concepts to work with when an Instructor is an Advisor:

Role model Clear communication Humor Another perspective Timing . Boundaries / not walls Get out of the way, get in the way Listening Guidance Integrity-Ethics Purpose Availability How is trainee embodying the principles of Ortho-Bionomy? Relationship Commitment Conversation	Specific feedback (positive feedback is most effective) Exchanging Self-assessment Bridging, Connecting Informative Non-Judgement Discernment Identifying strengths Presence Expectations Vision (of organization and individual) Professional standards Protection Curiosity, Play, Optimism, Exploring Pitfalls

3. Tutorials

Tutorials are defined as:

‘any one-on-one interaction between an Instructor and a Trainee that are required in the program.’

Tutorials include: Sessions Received, Consultations (formerly known as Private Discussions), Feedback Sessions, Evaluation Sessions, Supervised Demonstrations.

- When scheduling *any* appointment for a tutorial session remind the trainee to bring their paperwork so you can look through it and see how they are moving through the program.
- Every Instructor has an advisor role whether formal or not
- Don’t just sign off tutorials, read the feedback given regarding their work and the type of tutorials they have been having.
- Clarify the ways in which tutorial time can be used and how it can be helpful for the trainee’s learning process.
- The Advisor needs to keep the bigger picture of the trainee’s progress through the PTP in mind i.e. asking the questions ‘where does this trainee stand in relationship to the whole program, do they need special support, resourcing or accommodation?’
- The purpose of a feedback session is to provide feedback about the session itself and the quality of the work. It is also a time to discuss the trainee’s experience in the Training Program and for the Advisor to provide guidance.
- Does the trainee have regular one-on-one interaction with the Advisor?

Tutorials can be used in different ways such as:

- Supervision (e.g. discussion of certain clients).
- Practice and feedback on a specific technique.
- Recommending additional feedback sessions for practice or consolidation.
- Working on a client of the trainee followed by a discussion about the session.
- Discussion of the philosophy of Ortho-Bionomy and its application for the work and life.
- Sessions can be shared between two or three trainees at the time. Trainees can learn a lot from each other’s questions or watching a session, etc.
- Sit in witness as trainee has a session with another and then discuss the session.
- Discussion of the Training Program Record form and what it all means.

4. Feedback Sessions for the Practitioner and Advanced Practitioner Training Program:

A. The purpose of a feedback session is to help the trainee realize his/her strengths and any issues, areas that may need improvement, and possible ways to work differently.
B. Often the trainee is too intimidated to work with an "authority" i.e. the Advisor/Instructor. The Advisor can help assure the trainee by saying that the feedback session is not a test but a tool for learning.
C. The trainee will have a greater sense of control, if the trainee is asked to state what the trainee wants to get out of the session.
D. The trainee needs to know the Instructor's expectation: in relation to working with the Phases, other class material, what is going on in the Instructor's body, etc.
E. Some indicators for evaluation of the trainee's competence within the session are:
    - The quality of touch
    - The position of hands of the trainee's hands
    - The clarity of Phase 4 positioning
    - The capacity to meet the Advisor/Instructor (the client) in Phase 4, Phase 5 and Phase 6
    - Did I feel safe with this trainee practitioner?
    - What was the trainee's timing when the trainee was working?
    - Was there a clear beginning, middle and end to the session?
    - Identify specific behavior of the trainee that may need to be changed and worked with in the future
    - Did the trainee understand/embody the principles of Ortho-Bionomy? Which ones were more evident in the session?
F. Facilitate the trainee's experience of learning:
    - Teach skills of self-evaluation.
    - Teach the trainee to identify his/her skills.
    - During the feedback session, it is important to mention strengths, as well as what the trainee can improve upon. Do not put a 'but' between. Some Advisors may choose to use 'radical affirmation'.
    - Notice the number of issues and principles the trainee may need to work with. At that time, how many can the trainee handle working with, and are they appropriate for his/her level of evolvement in the PTP.
    - Have the trainee consider ways they could work on any issues or principles that have arisen from the feedback session? The Advisor might ask the trainee to write the feedback down and show the Advisor what they wrote. Often, the Advisor might find that they only hear one set of feedback, either the strengths or the issues to be worked with. The trainee may need to be guided to see a balanced feedback from the Advisor.

How to write up a session for feedback

The Advisor/Instructor will write what was the focus of the session for feedback i.e. what areas of the body the trainee worked with, in what areas was the trainee was competent and what recommendations the Advisor/Instructor may indicate that the trainee may need to work towards.

NOTE *Instructors need to "Stay in your lane." Know your own areas of competence and where you are lacking. Very few Instructors are expert in everything. Be ready to refer the trainee to other Instructors and available resources.*

5. Evaluation Sessions

(i) How to write an evaluation letter recommending the trainee to the Practitioner Review Committee (PRC)

- Address the letter to the PRC with the trainee's name and date on it.
- Write the focus of the session
- Discuss the trainee's ability to work with the Phases and how the trainee shifted and moved between them, what other areas of Ortho-Bionomy the trainee may have used such as Chapman's Reflexes or Isometrics, palpation skills, the mood created in the session i.e. the feeling of safety, the trainee's professionalism, did the trainee take a client history, did the trainee give the Advisor/Instructor self-care, the outcome of the session-was there a change in the Advisor/Instructor''s tension/pain patterns. (See 4 E. and 5 (ii) for more ideas)
- Write a recommendation to the PRC that the trainee become a Practitioner or Advanced Practitioner
- Sign the letter

NOTE Some Advisor/Instructors will not participate in an Evaluation Session with a trainee unless the trainee has previously given them a feedback session or they have some prior relationship with the trainee. This is a choice for each Advisor/Instructor to decide. Some advisors also choose to watch the session, and not directly receive the session, and this is acceptable.

(ii) Final Evaluation sessions at the end of the trainee's Practitioner Training Program and what indicators will be evident in the trainee's work:

A. Ability to work on the whole body, (except the cranium).
B. To know Phase 4 and to know how to get there.
C. To be able to meet the client in Phase 4: The use of the monitoring point and the amount of compression, "physical-ness", etc.

D. To know Phase 5 and to know when the trainee is in Phase 5.
E. An understanding of Phase 6.
F. To be able to integrate the different Phases with one another.
G. Being able to be present with the client.
H. Good and appropriate timing for each client.
I. Clear beginning, middle and end of a session.
J. To be able to integrate some of the material presented in other Ortho-Bionomy classes such as:

    Isometrics, Postural Re-Education and Post-Techniques, Exploration of Movement etc. into the session.

K. To be able to hear what the client wants from the session.
L. Ability to create safety for the client, quality of touch, speed of movement, area of connection, Phase of connection, etc.
M. Ability to receive input about the work from the client and the experience they are having in their body as the session is unfolding. Of course, this must be practiced with good feedback skills.

6. Additional Indicators to Consider for Advanced Practitioner Trainees

A. Is the trainee able to track the client physically, structurally, energetically, emotionally using their sensory mechanisms and the resources available to them?

B. Is the trainee in alignment with his/herself as he/she works.

B. Is the trainee able to work with the client on a Phase 4 level? Phase 5 level? Phase 6 level? Phase 7?

C. Does the trainee have the capacity to track from a broad structural perspective to specific tissue holdings?

D. Does the trainee have the capacity to shift focus/mood from physical to energetic and back to physical? Or to be present in both?

E. Does the trainee have a broader range than the benchmarks for the Practitioner Training Program—do they have comfort in a wider range of Ortho-Bionomy techniques, and strength that comes from experience with a broader range of clients?

F. Does the trainee show a depth of confidence from a greater experience and understanding of the work of Ortho-Bionomy?

G. Is the trainee responsible for their Training Program paperwork. The trainee must send a copy of the PTP or ATP to their Advisor/Instructor prior to sending it to the Office for the Advisor's perusal.

7. Demonstration Skills

The Advisor will be looking for:

- the essence of Ortho-Bionomy in the room where the demonstration is being held
- the relationship created between the trainee giving the demonstration and the audience and the people who are being demonstrated on the table.

Here is a checklist of what a Demonstration could contain.

Demonstration Skills

TIME SPAN: At least one to 2 hours

1. The trainee will have the room ready.
   This is a suggestion of a proposed format of the room.
   The trainee will have his/her business cards, pamphlets, an article and a mailing list format and pens bout Ortho-Bionomy laid out on a table. Kathy Kain's book and Luann Overmeyer's Self Care book should be on hand. The massage table will be at the front of the room and angle chairs around in a semi-circle. The trainee will stand in front of or at one end of the massage table-not behind it.
2. The trainee will introduce him/herself.
3. The trainee will talk about:
   - The definition of Ortho-Bionomy
   - The history of Ortho-Bionomy including the founder, Dr. Arthur Lincoln Pauls. There are photos of him on Bruce Stark's Facebook page.
   - The principles of Ortho-Bionomy including education and that the client is responsible for their own healing. Explain how Ortho-Bionomy works in a way that is easily understood-using simple visual aids can be helpful.
   - The trainee's personal story of how he/she came to Ortho-Bionomy and what it has done for them.
   - The changes the trainee has seen in some of his/her clients that have had Ortho-Bionomy. Give examples without naming names.
   - What a session is made up of and a plan of action.
4. The trainee will demonstrate on two to three people-they will do one or two techniques on each person-the trainee will choose something that the audience can see the release happen like psoas or shoulder, something 'showy'. The trainee will need to talk to the audience as the trainee works, keeping in mind that this is NOT a teaching or training session but a demonstration. The trainee will ask the person on the table questions about what they are feeling so the audience can hear it. The presentation

should last about 30 minutes. Short enough to keep the trainee's audience interested, long enough to get through the information and allow time for questions.

5. Question time - The trainee will answer questions from the audience
6. Conclusion - The trainee will reiterate what Ortho-Bionomy is about and thank them for coming and refer them to the pamphlets and business cards etc.

As well as looking for the clarity of what the trainee is speaking about, the Instructor/Advisor will be looking for the trainee's relationship with the audience and clients on the table.

Created by Debby Benson

8. Documented Sessions

When the Advisor goes through the fifty documented sessions with the trainee, the Advisor could ask the trainee to choose two or three clients that they worked with three or four times. The trainee would then talk about how the patterns of tension in the client's body changed over time, what techniques and phases were used and how the trainee tracked the client's patterns. When the Advisor is satisfied they can sign the fifty documented sessions off on the trainee's Practitioner or Advanced Practitioner Training Program.

9. Waivers

The Advisor will need to write a letter for an Anatomy and Physiology waiver and one for the Elements of a Successful Practice.

This is copied from the waiver form on p. 25 of the PTP.

Anatomy & Physiology –

The trainee will need to have met one of the following 3 available waiver requirements:

1. College Course

2. Professional training in the medical field

3. Training in massage school with an equivalent number of hours. Documentation Includes: Typed Letter from applicant required detailing reasons for waiver, No letter from Advisor required. Unofficial Transcript/Support documentation

Elements of a Successful Practice –

The trainee will need to have met one of the following 2 available requirements:

1. Business management and/or public relations experience

2. Class(es) taken at college or in work related training Documentation Includes: Typed Letter from applicant detailing reasons for waiver. Typed Letter from Advisor supporting waiver request, Unofficial Transcript/Support documentation

10. Study Groups

As a study group is a place where all phases and areas of Ortho-Bionomy can be taught, Study Groups are a convenient place for the Advisor to be able to guide the trainees of an area where the Advisor may be teaching. The Advisor will be able to notice where each trainee is placed in their Training Program.

11. Received Sessions

Received sessions are when a trainee receives a session from an Advisor/Instructor.

Appendix One

The Role of Advisors, and the Ortho-Bionomy® Practitioner Training Programs

Based upon a document written by Ursula Hofer for Advisors to give Trainees

Before an Advisor makes an agreement with a practitioner trainee to become their Advisor, it is very important for the Advisor to create a clear understanding of what the working relationship will entail.

The role of the Advisor is to facilitate the process of learning Ortho-Bionomy. As Ortho-Bionomy is not a technique learning, it entails understanding the philosophy of the work from within the trainee as well as its applications with the trainee's clients.

Becoming a practitioner doesn't only mean attending all the required classes. The tutorials offer the opportunity to tailor the program even more for the trainee's needs.

When the trainee does a feedback session with an Advisor, the trainee will be asked, and encouraged to think about prior to the session, what the trainee would like to get out of this process. Among other things, an Advisor will want to support the trainee to be able to develop self-evaluation skills.

One of the key ingredients of this process is open communication.

The discussion tutorials can be done over the phone or if an Advisor in available in the local area. Tutorials can be shared between two or three students. It is very helpful for trainees to bring in one of their clients for the tutorial that they may have some questions about.

An advisor may ask the trainee to sign-up for tutorials when the Advisor is in the trainee's area so there is time prior to the tutorial to check-in, see how things are going for the trainee, what areas of training that there may be questions about, etc.

Advisors encourage trainees to complete tutorials with other Instructors. The responsibility as an Advisor is to track the trainee's progress through the Practitioner Training, to keep an overview of where the trainee is in the process, what might be an important step to take in their training, at the present time.

At the same time, it is always so helpful, to experience different approaches to Ortho-Bionomy by working with other Instructors who aren't the trainee's Advisor.

Below are some questions the Advisor might require the trainee to write about before there is an agreement for the Advisor to begin supervising the trainee:

1. Why do you want to be a Practitioner of Ortho-Bionomy?
2. Why do you want from me as your advisor?
3. What do you expect of me as your advisor? What are your wants and needs in your training as you see them now?
4. What do you currently see as your strengths and issues?
5. Where do you see yourself currently in your training?

After receiving the answers to the above questions, the Advisor may like to set up the first tutorial either in person or on the phone, to discuss:

- what the trainee wrote
- to go through the Practitioner Training Program
- to answer any of the trainee's questions in this regard

The Advisor may charge the trainee a fee for tutoring and feedback/evaluation sessions. (The fee for one hour is $____ plus Gross Receipt Taxes of $___ at this time.)

Tutorial discussion sessions can be done over the phone. If the trainee wants to set up a phone call, then the trainee will need to call the Advisor and inform them of a time frame and how much time the trainee may think it will take, etc.

The trainee will only pay the Advisor for the actual time, the trainee will only get credit for the actual time. Advisors may have a 24-hour cancellation time. The Advisor may need the trainee to call him/her at his/her office and not at his/her home. Advisor's Office number is ________________.

Often, the Advisor will ask the trainee to write down feedback received from the Advisor for their learning. This allows the Advisor and trainee to double check the communication.

Criteria for Feedback and Evaluation Sessions

Feedback sessions are an important element of a Practitioner's training. Giving appropriate feedback engages the trainee in the learning process and clarifies for the trainee's their strengths and issues that may need work. Feedback sessions prepare the trainee for what is expected in an evaluation session.

In order, to maximize the learning for the trainee, Advisors will look for certain elements in a feedback session. Advisors will try to clarify what they see as essential for an evaluation session. Sometimes, trainees are fearful of working with Advisors/Instructors for feedback. Advisors/Instructors emphasize that this is an opportunity for learning. When experiencing the trainees' work, Advisors can give feedback that will help trainees to feel more confident in the effectiveness of their work.

At the beginning of the tutorial prior to the feedback/evaluation session, Advisors will discuss the time-frame for the session with the trainee. During the work on the table, the Advisors (the recipient of the work) are clients, very well-educated clients. Advisors give the trainee feedback about their experience, i.e. what feels good, what position or amount of the compression does or doesn't feel comfortable, etc.

After the table work, the Advisor will return to the role as an Instructor and will address issues such as:

- Was there a blend of different Phases?
- Was the session more physically oriented or more energetic, etc?

Of course, Advisors want to make sure the strengths of the trainee are addressed first. Advisors also weigh what kind of feedback would really help the person to become a 'better Ortho-Bionomist'.

Advisors always give feedback at the end of a session, and then it is suggested to 'sit' with the experience over the next twenty-four hours to see what we notice, so we can report any follow-on to the trainee. (Most of the time, this is in the form of an email.)

Elements to observe in Basic level feedback or evaluations session:

1. Recognition of the trainee, of their special capacities strengths, background.
2. Was the trainee able to hear the Advisor's request for focus of the session? And how does the trainee collect information for the session?
3. Was the work Ortho-Bionomy? Was it gentle? Effective?
4. Was there the ability to create safety for the client: listening to the client's requests, quality of touch, speed of movement, area of connection, Phase of connections, etc.
5. Was the trainee able to perform standard Phase 4 positioning? Or preferred positional release? Does the trainee understand the difference between the two?
6. What was the quality of the trainee's touch/palpation skills?
7. Did the trainee adequately meet the client physically? Energetically? Professionally? At a Phase 4 level? A Phase 5 level? A Phase 6 level? Was the Instructor/Advisor, as the client, met in the "Right Relationship" by the trainee?
8. Did the session have continuity and coherence?
9. Did the trainee incorporate Phase 4, Phase 5 and Phase 6 into their practice? Were they comfortable with all the phases of the work? Not required, but useful to notice.
10. The trainee's connection to self. What was the level of being present, being in one's self, being in a listening mode, comfort with one's self?

11. What is the quality of their timing? Do they hold the positions long enough? Or for too long? Do they have a sense of when the client has released? Are they aware and working with the reflexes?
12. When working with specific areas was the trainee still connected with the ”client” as a whole?
13. Was the trainee able to integrate some of the material presented in other Ortho-Bionomy classes such as Isometrics, Posture, Post-techniques or/and Chapman’s Reflexes.
14. Overall, what was the mood/quality that the trainee/practitioner created during the session? Was there the capacity to change plans if necessary? What did the trainee do if he/she gets confused, scared or overwhelmed?
15. In evaluation sessions: Notice if the trainee had the capacity to practice Ortho-Bionomy with skill, clarity and ethical professionalism.
16. How was the session structured, in regard to, the beginning, middle and end? Was there a comfortable, coherent beginning? Was there adequate closure?
17. How well did the trainee identify and self-evaluate their skill level?

Additional considerations for feedback/evaluations with Advanced Practitioner trainees.

1. Is the trainee able to track the client physically? Structurally? Energetically? Emotionally?
2. Is there the capacity to track from a broad structural perspective to specific tissue holdings?
3. Does the trainee have the capacity to shift focus/mood from physical to energetic and back to physical? Or can they be in both at the same time?
4. Does the trainee have a broader range than in the Practitioner Program? (comfort in a wider variety of Ortho-Bionomy techniques, and strength that comes from experience with a broader range of clients?)
5. Does the trainee show depth of confidence from greater experience and understanding of the work?

Qualifying Sessions for Associate Membership

1. Does the trainee understand the principles of Ortho-Bionomy and can the Advisor recognize the trainee’s work as Ortho-Bionomy®?
2. Can the trainee put together a reasonably competent session?
3. Is there good communication between the ‘client’ and the trainee?
4. Could you/would you refer someone to this trainee for an Ortho-Bionomy session?

(SOBI refers to Associate members.)