



HEALTH COACH INSTITUTE
spark the change

Student Policies & Procedures

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800 W Main Street Suite 1460
Boise, Idaho 83702

Health Coach Institute LLC
p. 877.914.2242

www.healthcoachinstitute.com
support@healthcoachinstitute.com

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About Health Coach Institute

What is Health Coach Institute

Health Coach Institute (HCI) is an educational organization dedicated to the teaching and advancement of coaching worldwide.

After coaching over 10,000 clients and students from more than 30 countries in the past 10 years, HCI is proud to be pioneering the new generation of health coaches who are changing the consciousness of the planet.

The curriculum is based on psychology, neuroscience, intuitive listening, habit change and healthy lifestyle design.

Our Definition of Health Coaching

A Health Coach is a master of habit change, an advocate for living a healthy, happy lifestyle, a teacher of transformation, and an accountability partner to keep clients striving to reach their ultimate goal.

A Health Coach does not prescribe medicine or take the place of a medical professional, they are the motivators to push the client toward lasting results and lifestyle change using holistic and natural methods.

A Health Coach sets attainable goals for their clients, suggests alternative ways to cope with setbacks, and supports their clients in the unmasking of the true meaning behind behaviors - unconsciously or in reaction to external demands. Health Coach Institute firmly believes that change cannot occur without accountability and sustained motivation, thus the important role of a Health Coach.

Our Mission and Objectives

Our premise is that a health coach is a master of habit change. Healthy habits create healthy results.

Our goal is to create the best coaches in the world in the art and science of habit change so we can collectively contribute to the healthy planet in which we want to live.

In order to fulfill its mission, Health Coach Institute is committed to helping its students understand the fundamental base of nutrition, health and wellness, master the art of habit change, establish personal growth for themselves and for others, plus launch themselves into a successful career in the field of health and transformational coaching.

General Policies and Procedures

Admissions Policy

HCI seeks to offer admission to students of the highest potential and motivation, irrespective of social, racial, religious or financial considerations.

Any and all admissions evaluations by HCI staff for a prospective student are made impartially and based upon the fulfillment of the following admissions and enrollment criteria:

The student must:

- Be a minimum of 18 years of age, and able to consent to undertaking this program of study
- Be interested in the subject matter of their program of interest
- Have the potential to benefit from the experience
- Have the motivation for study and to devote the requisite time and effort into completing the course
- Review and agree to abide by our Student Policies and Procedures
- Have sufficient access to the Internet in order to complete program of interest
- Be willing and able to pay course fees in full as specified in schedule of fees
- Review the tuition provided in the schedule of fees sent prior to enrollment
- Acknowledge and sign a Terms and Conditions Agreement, which will be provided during the admissions process, prior to enrollment
- Be able to satisfy any additional admissions criteria where appropriate and required

Admissions Procedure

Student admission and enrollment in a program of study can be carried out online or via discussion with a member of our Clarity Coach team. Clarity Coaches will endeavor to vet student's suitability for a program of study using the criteria defined in our "Admissions Policy" and advise the prospective student accordingly.

By virtue of enrolling, the student agrees that they satisfy the necessary admissions and enrollment criteria for the program of study and take full responsibility for the decision to enroll in a program of study.

Following the decision to enroll in a program of study with HCI, the student is required to make full payment of course fees or an initial deposit toward that amount dependent on the financial arrangement chosen by the student (either payment in full or an installment based payment plan).

After this payment has been made, students are provided with confirmation of payment, terms and conditions for the program of study, and access to the learning management system (LMS) (which contains the documents "Student policies and procedures", "Student code of conduct", and the "program syllabus" (for program of study) and academic calendar (for the program of study).

Students are expected to satisfy admissions and enrollment criteria by reviewing the documents made available to them on the LMS before submitting a signed terms and conditions agreement to HCI.

Once the terms and conditions have been signed and returned to HCI, the student is considered to be enrolled and provided with immediate access to their program of study

By submitting a signed terms and conditions agreement, each prospective student acknowledges that they agree to and have satisfied the admissions criteria set out in our "Admissions Policy".

Deferrals and Re-enrollment

HCI recognizes that students may need to delay enrollment or defer their studies for a variety of reasons and we endeavor to support students during occasions like this via our deferral policy. Generally, in the appropriate circumstances, HCI is willing to defer a student's enrollment up to six calendar months or allow them to re-enroll to a later cohort.

Deferral requests are required to be submitted to HCI by the student in writing via our designated student support channels. Following submission, the student's case will be reviewed by support staff and approved (or otherwise) by the Head of Student Services or designated staff. Should the deferral be approved, the date or cohort when a student will rejoin their program of study will be agreed and the necessary administration executed carried out to facilitate the change.

In the event that a student has previously withdrawn from a program of study and consequently wishes to re-enroll, they may be considered for re-enrollment provided that the reasons for previous withdrawal have been rectified and no other issues prevent re-enrollment to a program of study. Re-enrollment requests of this nature are to be submitted for review to the Head of Student Services, and judgments regarding re-enrollment are made at Health Coach Institute's sole discretion. Re-entering students will be charged at the current tuition rates for newly entering students.

Referrals

This "Student Referral Policy" is effective as of August 1st, 2016, there are no retroactive applications of this policy.

Existing or former students may refer new students to Health Coach Institute's Become A Health Coach program by sending these prospective students an email with their unique referral code. The unique code is only valid for 60 days from the time the unique code is generated.

"Existing students" are students who are currently enrolled in any Health Coach Institute program, and "former students" are either graduates or admitted into the program, but have not yet finished the program due to deferral, withdrawal or other reasons. In order to qualify as a "new student," that person must not have been previously enrolled in any Health Coach Institute program at any time.

The referred student must follow the instructions contained within the email to receive a discount off the Become A Health Coach tuition, if and only if, the new student enrolls in the course within 60 days from when the referral code was generated. During the enrollment process, the new student must use the referral code to accurately attribute the referral to the student referrer. When the new student successfully finishes the Become A Health Coach program, the student referrer shall receive a thank you gift.

Each existing or former student may refer an unlimited number of new students, however, they may receive no more than five thank you gifts regardless of the number of students who sign up or graduate from the Become A Health Coach program.

Student Resources

Program resources are primarily delivered online via our dedicated learning management system (LMS). Complete access to the LMS is provided immediately upon enrollment. Students are contacted and/or receive communications from Health Coach Institute regarding resources that are delivered outside of the LMS.

In addition to program resources, students are also provided with a dedicated student support service, consisting of a customer service team and a student services team.

The student support team is tasked with assisting students with any aspect of their studies. They are available via a variety of channels (specified below) and have active hours of operation 24 hours a day Monday to Friday (with the exclusion of school holidays).

Student support channels include:

- Student support portal facilitating self-service via a maintained knowledgebase and ticket submission or live chat support via our helpdesk software found at <https://healthcoachinstitute.freshdesk.com>
- Support ticket submission direct via email to support@healthcoachinstitute.com
- Live-chat support on our LMS <http://access.healthcoachinstitute.com>
- Region specific telephone support (regions currently covered are the USA, UK, and Australia)

The student services team is tasked with the monitoring and administration of LMS forums and student comments, as well as the monitoring and administration of social media both program specific and general. They provide information to students via these channels as well as identifying and escalating any relevant issues or questions to our student support team, ensuring that students are pro-actively engaged should any issues arise.

All student support and services activities and interactions are managed and logged via our helpdesk software, ensuring effective handling and support of students, as well as providing a framework for quality assurance and the continuous improvement of these services.

HCI reviews satisfactory progress at the mid-point of its programs and a student's Success Coach will notify a student should there be a lack of progress towards graduation in a timely manner.

In the event a student is concerned with any aspect of their studies, including personal academic progress, the student is invited to contact our student support team via designated channels. The student support team will assess the student's progress and assist by resolving any issues within the scope of the support team's role. Then the student support team will contact the student's Success Coach so that further support can be provided to the student. HCI reviews satisfactory progress at the mid-point of its programs and a student's Success Coach will notify a student should there be a lack of progress towards graduation in a timely manner.

Student Complaints

In the event a student wishes to issue a formal complaint to HCI, they are to document the issue in writing and submit to the Head of Student Services or designated staff via designated support channels or if preferred via email to feedback@healthcoachinstitute.com.

The formal written issue must state the issue and desired outcome, and should include any documentation that supports the issue.

The Head of Student Services or designated staff will review the written statement and any supporting documentation, gather facts, and provide a written response to the student within three business days. The decision made by the Head of Student Services or designated staff is final.

Student Records

All student records will be maintained by HCI for three years from the last date of attendance. Transcripts are maintained permanently.

All applicable student records are available to students upon request.

Student Conduct and Disciplinary Procedures

When a student conduct issue occurs, whether proactively identified by staff or reported via support channels, the matter is reviewed by the Head of Student services or designated staff and appropriate action taken as defined in our "Student Code of Conduct".

If the action taken is disputed by the student, they are to document the issue in writing and submit to the Head of Student Services or designated staff via designated support channels. The formal written issue must state the issue and desired outcome, and should include any documentation that supports the issue.

The Head of Student Services or designated staff will review the written statement and any supporting documentation, gather facts, and provide a written response to the student within three business days. The decision made by the Head of Student Services or designated staff is final.

Student Payments

The student shall pay the relevant program fees on the payment schedule specified in the Order Form (the "Payment Schedule") in United States Dollars ("USD"). Regardless of the actual payment method, the student shall provide to HCI a valid credit card or debit card ("Payment Card") for payment of Course fees until such time the Course is paid in full.

The student is responsible for ensuring that payments are made on time and in full according to the Payment Schedule. The student shall be responsible for non-payment of Course fees, even if the Course fees are paid by a third party.

A student on a payment plan has until 30 days after the start date of the Course to pay in full without paying any financing charges. A student wishing to pay in full more than 30 days after the start date of the Course may do so at any time, and will not be responsible for paying any future scheduled financing charges after that billing cycle; however, the student is responsible for all financing charges paid through that billing cycle. The student authorizes HCI to charge Student's Payment Card pursuant to the Payment Schedule in USD. The student shall bear all responsibility for third-party charges for payment processing, including, but not limited to, transaction fees, overdraft charges, and foreign exchange fees.

Students enrolling at HCI Live events are subject to event-specific terms.

Late Payments

The student's failure to pay HCI pursuant to the Payment Schedule (including the student's Payment Card issuer or online payment system not approving the charges for any reason) will result in the payment being declared late. The student will receive late payment notifications from HCI. Late payments may be subject to interest at a rate of 12% per annum (or the highest rate permitted by applicable law (if lower)). Payments delinquent by more than 30 days will result in loss of access to the program content and resources. The student's account may be submitted to a collections agency and reported to a credit bureau. The student shall bear the cost of collection if the student's account is sent to collections.

The student's failure to provide to HCI a valid Payment Card for payment of Course fees when they become due shall result in the student's account being declared late and the immediate loss of access to the program content and resources: HCI may, at its sole discretion, accelerate the student's account to collections.

Cancellations, Withdrawals and Refunds

Health Coach Institute prides itself on offering the best possible value in our programs and service, as such, we offer a "30-day money back guarantee" to all enrolling students.

The student is eligible for course cancellation and a complete refund in USD only within 30 days from the official start date of the Course, provided that the request is submitted to HCI in writing via designated support channels prior to the expiration of the 30-day refund period. If a student changes the cohort of enrollment for any reason, including a deferral of the Course to a later term, the 30-day refund period runs from the start date of the original cohort of enrollment unless specified otherwise in writing by HCI.

A student is not eligible for a course cancellation and refund if a request is made after the expiration of the 30 day refund period. In extenuating circumstances (such as illness and death), HCI may review each case at its sole discretion. The student must provide an explanation and proof of the extenuating circumstance in writing via designated support channels. If a refund is granted, HCI may assess an administration fee and the student must pay for any part of the Course that has taken place prior to the refund request on a pro rata basis.

Refunds shall be in USD at the time the refund is processed by HCI. HCI shall not be liable for any foreign exchange rate differences between the purchase price of the Course and the refund.

Violation of the terms of this Agreement for any reason, including non-payment, voids the student's right to a refund.

Become A Health Coach Program

Program Overview and Composition

The Become a Health Coach program is an entry-level course, intended for those who have little or no experience in coaching or healthy lifestyle design. As such the program seeks to equip its students with the core skills they will need to become an effective Health Coach.

Each one of these core skills has been grouped in a general sense for clarity and to ensure the student has a deliberate focus on assimilating the content provided. We have named each group covering a core skill group a "Pillar", and the Become a Health Coach program contains a total of 4 Pillars.

Recognizing that not all students are looking to become professional self-employed Coaches following graduation, we have designated the business-centric Pillar 4 as not being mandatory for the awarding of a certificate of completion, while still making it available for those that do wish to leverage the knowledge therein post-graduation.

- Program Duration: 6 months
- Graduating Document: Certificate
- Suitable Graduate Occupations: Health Coach, Various Health and Wellness positions

Course Component	Course Component Description	Duration (Weeks)	Mandatory (Yes/No)
Pillar One	Nutrition for Health Coaches	Six	Yes

Pillar Two	Transformational Coaching Skills	Fourteen	Yes
Pillar Three	Personal Growth	Five	Yes
Pillar Four	Proven Marketing & Simple Business Systems	Six	No

Program Description

Our curriculum is thoughtfully designed so students can create a new, exciting career as a professional Health Coach in just 6 months from anywhere in the world via Pillars 1-3 of the program. Each lesson draws on cutting edge psychology, neuroscience and healthy lifestyle design.

Our course is carefully delivered in 4 digestible pillars: Nutrition for Health Coaches; Transformational Coaching; Personal Growth; and Proven Marketing and Simple Business Systems.

Program Objectives

To provide a comprehensive education focused on the essentials of transitioning into a career as a health coach or related profession, for anyone with a passion to assist others in becoming a healthier version of themselves.

Become A Health Coach's curriculum covers a wide variety of the most essential elements of nutrition, health and wellness. It focuses on the fundamentals of providing transformational habit change, prepares students for the experience of coaching clients successfully and covers the basics of attracting clients while launching a business online.

Course Syllabus: Orientation

Duration: Not applicable

Pre-requisites: None

Description:

A general introduction to the course and the concepts covered therein.

Topics covered include but are not limited to the following:

- Define Health Coaching in order to understand what it is, what it is not and client expectations.
- Establish the difference between health coaches and other clinically licensed healthcare practitioners.
- Relay the truth about creating lasting habit and lifestyle change.
- Discuss the future of healthcare with emphasis on how health coaching fits into the big picture.
- Discover the 4 Pillars of masterful health coaches and why they are needed to build a successful health coaching career.

Course Syllabus: Pillar One (Nutrition for Health Coaches)

Duration: Six weeks

Prerequisites: Orientation

Description:

Narrow in on the critical diet and lifestyle information you need to know as a health coach in order to provide lasting results for your clients. Establish the everyday habits that contribute to a healthy lifestyle and how to make them stick, both for yourself and for your clients.

Topics covered include but are not limited to the following:

- Establish the essential diet and lifestyle information that Health Coaches need to know to help clients get results.
- Teach students to break down the basics of dietary theory so they can help their clients create a diet that's right for their unique body.
- The six questions a master Health Coach must ask to help their clients to achieve their health and wellness goals.
- Know how to balance blood sugar and why blood sugar is critical to achieving health goals.
- Learn the reason why "how" you eat is more important than the "what".
- Discover our top 7 solutions for resolving digestive issues.
- Uncover what drives behaviors regarding food, body and health and how to shift the behaviors clients no longer want.
- Timing meals in order to reduce stress and maintain balanced blood sugar.
- Manage your time efficiently in order to preserve your energy while serving your clients.

Course Syllabus: Pillar Two (Transformational Coaching Skills)

Duration: Fourteen weeks

Prerequisites: Orientation, Pillar One

Description:

Establish a foundation in the Transformational Coaching Method methodology so coaches can successfully create lasting habit change. Train students to deliver our proven 90-day coaching program. This program was designed by our co-founder, Stacey Morgenstern, after working successfully with hundreds of clients in her health coaching practice. Learn to have an initial conversation with potential clients to determine if the 90-day coaching program is the right fit for their needs.

Topics covered include but are not limited to the following:

- Establish why Transformational Coaching skills are the secret to creating lasting change.
- How Transformational Coaching is different from other coaching methodologies.
- Discover how to describe your health coaching program in a compelling and accurate way to prospective clients.
- Find out how to effectively coach on prospective clients' worries, so you can help them decide whether or not to participate in the 90-day health coaching program.

- Practice delivering each of the 12 sessions in HCI's "90-Day Total Transformation" health coaching program.
- Learn the science behind structuring a successful coaching program, so you can create your own coaching programs as you progress in your coaching career.

Course Syllabus: Pillar Three (Personal Growth)

Duration: Five weeks

Prerequisites: Orientation, Pillar One, Pillar Two

Description:

The purpose of this pillar is to help students explore their relationship with the "Big 5" areas of life, so that they may advance in their ability to coach their clients on any topic, in addition to health. Our students will end up working with clients on relationships, career, money, and more; this Pillar prepares them to do so successfully.

It also helps them to discover where they might be personally triggered in a coaching relationship, which helps the coach determine which aspects of their own personal growth need attention.

Topics covered include but are not limited to the following:

- "The Big 5": areas of your life that reflect your alignment with your purpose.
- How your work as a health coach affects every area of your clients' lives.
- Learn how to combine the richness of your personal history, experience and expertise to create a personal brand that helps you stand out from the crowd of other health coaches.
- Why money is a part of your spiritual path, and the shadow beliefs that are likely sabotaging your ability to make and keep more money.
- How to take control of your financial destiny while doing what you love.
- How to gain the support of your loved ones as you embark on your new career.
- Learn how to ask for what you want and get it.
- Connect your career to your life purpose.

Course Syllabus: Pillar Four (Proven Marketing & Simple Business Systems)

Duration: Six weeks

Prerequisites: None

Description:

The focus in this Pillar is to help students generate their first or next \$5K as a health coach. Students will learn marketing skills to build their client list and establish productive business systems. They will learn how to prioritize their time and balance between family life, passions, and health coaching. As a bonus they will gain access to a custom website and administrative platform, specifically designed to help health coaches attract and service clients.

Topics covered include but are not limited to the following:

- A simple system to make your first or next \$5K as a Health Coach

- How to get clients from networking and referrals
- How to get clients from talks & workshops
- How to get clients online.
- How to price your health coaching programs
- How to schedule clients & prioritize your to-do list so you can maximize your time, even if you have kids, a job, hobbies, or passions
- How to become confident, courageous and client-attractive as a Health Coach

Program Delivery and Methods of Instruction

The program is delivered online via our dedicated learning management system (LMS), access for which is provided immediately upon enrollment.

The program content itself is made available to the student on a scheduled basis, which (with the exception of school holidays) results in the student gaining access to new content on a weekly basis.

Program content delivery is primarily via video, audio, and written resources and assessment is carried out using e-learning mechanisms such as quizzes, all of which are available to enrolled students on the LMS.

Within the LMS, students can expect to receive the following resources as part of their program:

- High-quality on-demand video lessons
- High-quality on-demand audio lessons
- Handouts and supplemental written documentation
- Complete written guides and coaching solutions
- Written practice exercises and coaching scripts
- Assignment submission areas and program quizzes

In addition to the online delivery of the course, Health Coach Institute provides 'off-platform' resources. These resources include dedicated social media platforms, regular contact hours with senior academic staff via our "Office Hours" resource, regular opportunities to meet 1-on-1 with personal Success Coaches, and access to a custom website building function "CoachLeads."

Outside of the LMS, students can expect to receive the following resources as part of their program:

- Twelve "Office Hours" calls with Carey Peters and Stacey Morgenstern
- Five, private one-to-one coaching sessions with a Success Coach
- Access to a monitored and supported cohort-specific Facebook group
- Access to the "CoachLeads" website builder service

All of the resources mentioned above are delivered to the student in a considered and effective way, using best e-learning and educational practices wherever possible.

Students deemed "at-risk" of falling behind in their studies or those that request additional assistance may be provided with further resources in addition to those specified above.

Program Assignments and Coursework

As part of the Become a Health Coach program, students are issued assignments and coursework relating to the content therein with the following goals:

- ensuring our students get practical experience with the subject matter of the program
- improving the potential that learning objectives are met by our students
- Increasing collaboration and engagement between students

The following tables show the release of assignment and coursework, by Pillar and week within the Become a Health Coach program. The first table contains assignments and coursework that can contribute toward a certificate of completion, and the second table contains those that cannot contribute toward a certificate of completion.

Assignment/Coursework that can contribute toward certificate		
Pillar	Week of Pillar	Assignment/Coursework Released
Pillar One	Week One	Skills Lab 1: 10 Dietary Paradigms Discussion
Pillar One	Week Two	Skills Lab 2: Water & Protein to Balance Blood Sugar
Pillar One	Week Three	Skills Lab 3: Uncover The Why Beneath The WHY
Pillar One	Week Four	Skills Lab 4- "How" Master Checklist
Pillar One	Week Five	Skills Lab 5 - How To Change Behaviors, Beliefs & Identity Subtly & Quickly
Pillar One	Week Six	Skills Lab 6: "WHEN" and "WHERE" Master Checklist, Pillar 1 Quiz
Pillar Two	Week One	Skills Lab 7: Mirroring, Backtracking & Mismatching
Pillar Two	Week Two	SKILLS LAB 8: CTD CONVERSATION 1
Pillar Two	Week Three	SKILLS LAB 9: CTD CONVERSATION 2
Pillar Two	Week Four	SKILLS LAB 10: CTD CONVERSATION 3
Pillar Two	Week Five	SKILLS LAB 11: CTD CONVERSATION 4, 90-DAY TRANSFORMATIONAL PRACTICE CLIENT SESSION 1
Pillar Two	Week Six	SKILLS LAB 12: CTD CONVERSATION 5, 90-DAY TRANSFORMATIONAL PRACTICE CLIENT SESSION 2 AND 3
Pillar Two	Week Seven	Skills Lab 13: CTD Conversation 6, 90-Day Transformational Practice Client Session 4
Pillar Two	Week Eight	SKILLS LAB 14: 90-DAY TRANSFORMATIONAL PRACTICE CLIENT SESSION 5
Pillar Two	Week Nine	SKILLS LAB 15: 90-DAY TRANSFORMATIONAL PRACTICE CLIENT SESSION 6
Pillar Two	Week Ten	Skills Lab 16: 90-Day Transformational Practice Client Session 7
Pillar Two	Week Eleven	Skills Lab 17: 90-Day Transformational Practice Client Session 8 and 9
Pillar Two	Week Twelve	Skills Lab 18: 90-Day Transformational Practice Client Session 10
Pillar Two	Week Thirteen	Skills Lab 19: 90-Day Transformational Practice Client Session 11

Pillar Two	Week Fourteen	Skills Lab 20: 90-Day Transformational Practice Client Session 12, Pillar 2 Quiz
Pillar Three	Week One	Skills Lab 21: The Discovering You Interview + Creating Your Personal Blueprint
Pillar Three	Week Two	SKILLS LAB 22: THE MONEY MIRRORS
Pillar Three	Week Three	SKILLS LAB 23: TRANSFORMING YOUR MONEY LEGACY
Pillar Three	Week Four	SKILLS LAB 24: HOW TO ASK FOR WHAT YOU WANT... AND GET IT
Pillar Three	Week Five	SKILLS LAB 25: WHAT'S IMPORTANT TO ME, PILLAR 3 QUIZ

Assignment/Coursework that cannot contribute toward certificate		
Pillar	Week of Pillar	Assignment/Coursework Released
Pillar Four	Week One	Skills Lab 26: Create Your Coaching Calendar
Pillar Four	Week Two	SKILLS LAB 27: CREATE YOUR STARTER FEE
Pillar Four	Week Three	SKILLS LAB 28: THE SILVER BULLET COACHING QUESTIONING SEQUENCE
Pillar Four	Week Four	SKILLS LAB 29: THE SILVER BULLET COACHING QUESTIONING SEQUENCE
Pillar Four	Week Five	SKILLS LAB 30: REVIEW YOUR PERSONAL EMAIL COPY
Pillar Four	Week Six	SKILLS LAB 31: HOW TO GET CLIENTS ONLINE PILLAR 4 QUIZ

Program Evaluation Methods

We evaluate students in both a qualitative and quantitative way throughout the course of the program.

Qualitative evaluation is on-going and ordinarily does not have an effect on the awarding of a certificate but may lead to us pro-actively engage with the student (should we have concerns about the academic progress or engagement). We qualitatively assess students in private coaching sessions with their Success Coach or via contact with our team in support or social media settings. Students may also monitor their own progress via feedback mechanisms on the LMS.

Quantitative assessment takes place (by its nature) through assignment submissions ("proofs") or quizzes being passed or failed. These assessments contribute toward the awarding of a certificate and they include the following:

- Proof submission for Skills Lab assignments
- Satisfactory scoring in our Pillar quizzes (Pillars 1-3 only)
- Marking of video content within lessons as viewed
- Proof submission for the CTD (Closing The Deal) conversations
- Proof submission for the "90 Day Transformational Practice Client" sessions

Grading and Certification Requirements

We employ a "pass/fail" grading system for our Become a Health Coach program, with those passing becoming recipients of a certificate and graduates of the program. In order to pass the program and become certified, a student is required to have successfully satisfied the following criteria with 12 months of their official cohort start date:

- Viewing and marking 100% of video content in Pillars 1-3
- Executing and providing proofs for no less than 50% of Skills Labs within Pillars 1-3
- To have scored more than 80% in Pillar Quizzes 1, 2 and 3
- Executing and providing proofs for 6 CTD (Closing The Deal) conversations
- Executing and providing proofs for all 24 "90 Day Transformational Practice Client" sessions (2 clients at 12 sessions each).

Additional Policies and Procedures

General policies and procedures apply, there are no course specific revisions.

Holistic MBA Graduate Intensive Program

Program Overview and Composition

Holistic MBA Graduate intensive is an advanced certificate course, intended for those who have prior education and training in coaching. As such the program seeks to provide the student with advanced business and marketing skills in addition to certifying them in advanced Transformational Coaching Method (TCM) techniques.

These graduate skills are grouped in a general sense for clarity and to ensure the student has a deliberate focus on assimilating the content provided. We have named each training group a “Module”, and the Holistic MBA Graduate Intensive has two extended Modules.

Recognizing that not all students are looking to become professional self-employed Coaches following graduation, we have designated the business-centric Module 1 as not being mandatory for the awarding of a certificate, while still incorporating it for those that do wish to grow their coaching business to a higher tier.

- Program Duration: 12 months
- Graduating Document: Certificate
- Suitable Graduate Occupations: Health Coach, various health and wellness positions

Course Component	Course Component Description	Duration (Weeks)	Mandatory (Yes/No)
Module One	The Business of Coaching	Twenty-four	No
Module Two	The Art of Coaching	Twenty-two	Yes

Program Description

Holistic MBA Graduate Intensive is an advanced level education for students who have already earned a degree, certificate or license elsewhere and now want to create a lucrative coaching career. It is designed to guide students into a place of mastery in the business and the art of coaching. It provides the essential business, marketing, mindset and coaching skills needed to advance in a full-time coaching career.

Program Objectives

This program is designed to help established coaches take their business to the next level and deepen their coaching skills through certification in the “The Transformational Coaching Method”. The first Module of the program focuses on advanced marketing and business building skills that are designed to help students get their first or next \$10,000 in revenue in the first 10 weeks of the course. Students will also deepen their coaching skills in Module One by mastering the fundamental coaching skills that we call the “12 Commandments of Coaching”.

The second Module deepens coaching skills by training students in the Transformational Coaching Method coaching methodology, so they can facilitate profound transformation for their clients. The mission of the

Transformational Coaching Method program is to create more masterful coaches in the world. It requires a previous coaching certificate, license or degree in order to participate.

Course Syllabus: Orientation

Duration: Not applicable

Pre-requisites: None

Description:

The orientation is the first glimpse into building clientele to create a masterful coaching business. Students receive an array of materials to help them bring in ideal clients. They are taught how to prepare their mindset, their lifestyle and their finances as entrepreneurs. As a bonus there is a guide on how to begin generating coaching revenue before starting the program. The overall goal is to guide students in their business and help them seek ways to make a living while doing what they love.

Topics covered include but are not limited to the following:

- Establish a solid infrastructure so you can confidently receive clients and money without sacrificing your core values.
- Conceive an inspiring vision for your future and define success on your own terms.
- Discover how to maximize your time to keep self-care sacred, avoid being overwhelmed, increase productivity, and ensure a steady income (includes sample calendars).
- Create "room" for success in the "HMBA Grad" journey by clearing away mental, emotional and physical clutter that might stop you or slow you down from achieving the success you want.

Course Syllabus: Module One (The Business of Coaching)

Duration: Twenty-four weeks

Pre-requisites: Orientation

Description:

Module One is structured to support and stretch students reach a financial goal of making \$10,000 in coaching revenue in the first 10 weeks of the course. The first Module is built to establish smart business strategies and habits that create financial results. Students are equipped with a number of tools, templates and personal support to help them develop their coaching practice into a business that serves them and their clients at the highest level.

Topics covered include but are not limited to the following:

- Implement simple money practices that lay the foundation for consistent income.
- Clarify the decisions you'll need to make about your programs and your business.
- Price your programs with certainty and ease.
- Create your unique, branded Signature System.
- Master networking from a place of service and not sales.
- Discover how to take bold action, so you can move from "stuck" to "celebrity status" in your coaching niche.

- Learn the art of constructing a talk that attracts clients
- Discover how to attract ideal clients to your website and turn them into paying clients.
- Navigate the overwhelming world of social media.
- Create a clear plan with focused action for your next phase of business growth.

Course Syllabus: Module Two (The Art of Coaching)

Duration: Twenty-two weeks

Pre-requisites: Orientation, Module One

Description:

The second Module focuses on the art and science of habit. Students learn masterful Transformational Coaching Method coaching skills that can create change for their clients at the levels of behavior, beliefs and identity. This practice allows coaches to help open up a client's deepest desires and set them on a path for success. Students are required to complete 10 transformational coaching skills labs and a series of three personalized coaching calls incorporating their trainings to achieve their certificate.

Topics covered include but are not limited to the following:

- The creation of TCM and why this concept will make you a stand-out coach.
- Identify exactly what your clients (and you) really want.
- Develop Advanced Rapport and how it cultivates trust, relaxation and openness.
- Learn the right questions to ask, in order to help your clients clarify what's keeping them stuck.
- Learn what ecology is and why addressing ecology is the way to facilitate deep change.
- Open up new possibilities for your client when they can't seem to see a way out.
- Recognize and transform triggers for any behaviors your clients want to change.
- What to do when a client wants two things that seem to conflict with each other.
- Help your clients easily and quickly generate new behaviors.

Program Methods of Instruction

The program is delivered online via our dedicated learning management system (LMS), access for which is provided immediately upon enrollment.

The program content itself is made available to the student on a scheduled basis, which (with the exception of school holidays) results in the student gaining access to new content on a weekly basis.

Program content delivery is primarily via video, audio, and written resources and assessment is carried out using e-learning mechanisms such as quizzes, all of which are available to enrolled students on the LMS.

Within the LMS, students can expect to receive the following resources as part of their program:

- High-quality on-demand video lessons
- High-quality on-demand audio lessons

- Handouts and supplemental written documentation
- Complete written guides and coaching solutions
- Written practice exercises and coaching scripts
- Assignment submission areas and program quizzes

In addition to the online delivery of the course, Health Coach Institute provides “off-platform” resources. These resources include dedicated social media platforms, regular contact hours with senior academic staff via our “Office Hours” resource, regular opportunities to meet with personal Success Coaches, and access to a custom website building function “CoachLeads.”

Outside of the LMS, students can expect to receive the following resources as part of their program:

- Twenty-four ‘Office Hours’ calls with Carey Peters and Stacey Morgenstern
- Ten private one-to-one coaching sessions with a Success Coach
- Access to a monitored and supported cohort-specific Facebook group
- Access to the “CoachLeads” website builder service
- Access to two Program-specific live retreats

All of the resources mentioned above are delivered to the student in a considered and effective way, using best e-learning and educational practices wherever possible.

Students deemed “at-risk” of falling behind in their studies or those that request additional assistance may be provided with further resources in addition to those specified above.

Program Assignments and Coursework

As part of the Holistic MBA Graduate Intensive program, students are issued with assignments and coursework relating to the content therein with the aims of:

- Ensuring our students get practical experience with the subject matter of the program
- Improving the potential that learning objectives are met by our students
- Increasing collaboration and engagement between students

The following tables show the release of assignment and coursework, by Module and lesson within the Holistic MBA Graduate Intensive program. The first table contains Module One assignments and coursework that cannot contribute toward the awarding of a certificate, and the second table contains Module Two assignments and coursework that that can contribute toward the awarding of a certificate.

Assignment/Coursework that cannot contribute toward certificate		
Module	Lesson	Assignment/Coursework Released
Module One	Lesson One	Skills Lab 1: Define Clearly

Module One	Lesson Two	Skills Lab 2: Set Boundaries
Module One	Lesson Three	Skills Lab 3: Build Rapport
Module One	Lesson Four	Skills Lab 4: Deepen Your Intuition
Module One	Lesson Five	Skills Lab 5: Listen Actively
Module One	Lesson Six	Skills Lab 6: Ask Transformational Question Sequences
Module One	Lesson Seven	Skills Lab 7: Communicate Directly
Module One	Lesson Eight	Skills Lab 8: Spark Awareness
Module One	Lesson Nine	Skills Lab 9: Design Empowered Action Steps
Module One	Lesson Ten	Skills Lab 10: Plan and Set Meaningful Goals
Module One	Lesson Eleven	Skills Lab 11: Manage Progress and Offer Accountability
Module One	Lesson Twelve	Skills Lab 12: Trust Yourself

Assignment/Coursework that can contribute toward certificate		
Module	Lesson	Assignment/Coursework Released
Module Two	Lesson One	Skills Lab 1: Foundational Paradigms of the Transformational Coaching Method.
Module Two	Lesson Two	Skills Lab 2: Uncovering Your Client's Deepest Desire
Module Two	Lesson Three	Skills Lab 3: The Key Coaching Technique For Transformation
Module Two	Lesson Four	Skills Lab 4: The Most Powerful Coaching Questions You Can Ask, Begin TCM coach/client project (3 sessions total)
Module Two	Lesson Five	Skills Lab 5: Ecology: Masterful Coaching
Module Two	Lesson Six	Skills Lab 6: Perspective: Subtle Coaching Tricks That Change Everything
Module Two	Lesson Seven	Skills Lab 7: Reframes: How Meanings Determine How We Feel
Module Two	Lesson Eight	Skills Lab 8: Rewiring Your Brain For Behavior Change
Module Two	Lesson Nine	Skills Lab 9: Resolving Inner Conflicts With "Parts Work"
Module Two	Lesson Ten	Skills Lab 10: Facilitating Alignment
Module Two	Lesson Eleven	No assignments set.
Module Two	Lesson Twelve	No assignments set.

Program Evaluation Methods

We evaluate students in both a qualitative and quantitative way throughout the course of the program.

Qualitative evaluation is on-going and ordinarily does not have an effect on the awarding of a certificate but may lead to us pro-actively engage with the student (should we have concerns about the academic progress or engagement). We qualitatively assess students in private coaching sessions with their Success Coach or via contact with our team in support or social media settings. Students may also monitor their own progress via feedback mechanisms on the LMS.

Quantitative assessment takes place (by its nature) through assignment submissions ("proofs") or quizzes being passed or failed. These assessments frequently do contribute toward the awarding of a certificate and they include the following:

- Proof submission for Skills Lab assignments
- Marking of video content within lessons as viewed
- Proof submission for "TCM coach/client project" assignments

Grading and Certificate Requirements

We employ a "pass/fail" grading system for our Holistic MBA Graduate Intensive program, with those passing becoming recipients of a certificate and graduates of the program. In order to pass the program and become recipients of a certificate, a student is required to have successfully satisfied the following criteria with 14 months of their official cohort start date:

- Viewing and marking 100% of video content in Modules Two
- Executing and providing proofs for 100% of Skills Labs in Module Two
- Executing and providing proofs for 3 TCM coach/client project sessions

Additional Policies and Procedures

General policies and procedures apply. In addition, the following additional policy applies:

A1) In addition to the standard requirements as defined in the HCI "Admissions Policy", prospective students wishing to enroll within the Holistic MBA Graduate Intensive program must be able to demonstrate completion of prior education, training or experience in Coaching in order to be applicable for enrollment.

Advanced Nutrition For Health Coaches Terms

Intellectual Property

All Program content, material, protocols, the Website and other items provided or made available to student by HCI in connection with the Program (the "Materials") are the sole intellectual property of HCI and/or the Expert, as the case may be. This intellectual property is provided to student for individual use only, shall be non-transferrable (except to student's paying customers or clients) and is intended for a single-user only (student may not access the Program or Website for or on behalf of another student or health coach and shall not share the Materials with anyone other than student's own paying customers or clients). Except for rights expressly granted to student by HCI in writing, HCI and/or Expert, as applicable, retain all rights to title to and interest in the intellectual property. Student shall not claim ownership and, except as aforesaid shall not sell, share, remove, copy, reproduce, disseminate the intellectual property. Student shall not interfere with HCI's or the Expert's rights over its intellectual property. To the extent that student contributes, in whole or in part, to any derivatives, improvement(s) or modification(s), or makes any suggestions, enhancement requests, recommendations, comments, feedback, ideas or the like, to HCI's or Expert's intellectual property ("Improvements"), student hereby assigns to HCI or Expert, as applicable, all right, title and interest in and to such Improvements.

ANHC Program Participant Agreements

Student shall not exceed student's scope of practice and/or knowledge. If student has any questions or concerns about the suitability or applicability of or interactions between a Program protocol and a customer's or client's medical condition and/or medication (including vitamins and supplements), student shall request that the customer or client immediately seek medical advice from his or her physician (or if student is trying the protocol out on himself or herself, student shall do so). Student agrees not to hold himself or herself out as a coach certified in any one or more of the Program protocols or by one or more of the Experts whose protocols are contained in the Program.

Indemnity

Neither HCI nor Expert shall be responsible or liable to student or any of student's customers or clients in any manner in connection with student's use of the Program, Materials or the Website. Student shall indemnify, defend and hold harmless Company and Expert and each of their officers, directors, members, shareholders, managers, employees, agents, successors and assigns from and against any and all claims, losses, liabilities, damages, penalties, fines, forfeitures, judgments, and any other fees, costs, and expenses, including reasonable attorneys' fees and related costs and expenses, resulting from (i) student's use of the Program, Materials or Website, and (ii) any claims of student's customers or clients arising out of or directly or indirectly related to the Program, Materials or Website.

HCI's Authority

HCI has the right to change, amend or update the Program, Materials, Website or its policies related to the Program at any time.

Management and Academic Staff

Management Roles

Staff Name	Management Role/Position
Eric Neuner	Chief Executive Officer
David Berger	Chief Financial Officer
Stacey Morgenstern	Co-President
Carey Peters	Co-President
Erika Sheets	Director of Enrollment
Matt Sussman	Vice President of Operations / Boise Office Director
Nick Baker	Head of Student Services
Lucas Seipp-Williams	Head Success Coach

Academic Roles

Staff Name	Management Role/Position
Stacey Morgenstern	Co-President
Carey Peters	Co-President
Lucas Seipp-Williams	Head Success Coach
Christine Catino	Success Coach
Melissa Paz	Success Coach
Samantha Schmuck	Success Coach
Whitney Harris	Success Coach
Blue Russ	Success Coach
Denise McKinney	Success Coach

Description of Academic Staff

Stacey Morgenstern, Co-President

Relevant Experience/Qualifications:

- University of Massachusetts, Amherst Bachelor's in Arts & Sciences
- Institute of Integrative Nutrition, Certified Health Coach

Further Information:

Stacey Morgenstern is a co-founder and creator of Health Coach Institute, an international coach training company dedicated to creating leaders in the art, science, and business of transformation. The organization's annual live events attract aspiring coaches from all over the globe who want to step into their spotlight, shine out loud and dare to live their best lives ever. Since joining together in 2010, Carey and Stacey have trained over 10,000 coaches from 30 countries in their flagship trainings, including their one-of-a-kind coach certification training.

Carey Peters, Co-President

Relevant Experience/Qualifications:

- DePaul University, Bachelor of Fine Arts
- Institute of Integrative Nutrition, Certified Health Coach

Further Information:

Carey Peters is a co-founder and creator of Health Coach Institute, an international coach training company dedicated to creating leaders in the art, science, and business of transformation. The organization's annual live events attract aspiring coaches from all over the globe who want to step into their spotlight, shine out loud and dare to live their best lives ever. Since joining together in 2010, Carey and Stacey have trained over 10,000 coaches from 30 countries in their flagship trainings, including their one-of-a-kind coach certification training.

Lucas Seipp-Williams, Head Success Coach

Relevant Experience/Qualifications:

- Eckerd College, Bachelors of Arts in Sociology
- Institute of Integrative Nutrition, Certified Health Coach and Student Mentor
- Landmark Worldwide, SELP Coach and Introduction Leader
- Personalized Metabolic Nutrition, Certification in Metabolic Typing
- Founder, Baltimore Health Coach and ManMadeHealth

Further Information:

Lucas Seipp-Williams is the Director of the Success Coach Department at the Health Coach Institute. Additionally, he trains and coaches students of the Become A Health Coach and HMBA Grad Intensive programs. Prior to joining Health Coach Institute in 2015, Lucas built a successful health coaching business, in

which he coached over 1,000 clients for over 8,000 coaching hours.. Early in his health coaching career, Lucas also worked as a Certified Youth Food Educator, Certified Yoga Teacher and a Licensed Massage Therapist.

Christine Catino, Success Coach

Relevant Experience/Qualifications:

- Mount Wachusett Community College, Associate Degree in Business Administration
- Institute for Integrative Nutrition, Certified Health Coach
- HolisticMBA, Certified Transformational Coaching Method Mastery Coach

Further Information:

Christine Catino has had the privilege of coaching hundreds of students here with Health Coach Institute and helping them to become leaders as health coaches in the art, science & business of transformation. In addition to this, she coaches privately 1 on 1 and in small groups helping entrepreneurs to break through limiting beliefs. Her work is also influenced by Tony Robbins, Rob Scott, Randi Dukoff, Jill Hope and Reed Davis.

Melissa Paz, Success Coach

Relevant Experience/Qualifications:

- New Mexico State University, Bachelors of Science in Modern Dance
- Holistic MBA, Certified Transformational Coaching Method Mastery Coach
- Health Coach Institute, Become a Health Coach Certificate

Further Information:

Melissa is a transformational coach with more than a decade in the wellness industry. She received training with Carey and Stacey and has worked as a coach, workshop facilitator, yoga teacher and co-owner of two award winning yoga studios in Washington State. She specializes in helping clients embody change and take empowered action to impact the world.

Samantha Schmuck, Success Coach

Relevant Experience/Qualifications:

- Life University, Bachelor's in Health Coaching
- Institute of Integrative Nutrition, Certified Health Coach
- Holistic MBA, Certified Transformational Coaching Method Mastery Coach

Further Information:

Samantha has 10 years of experience in the health and wellness community. She has served as the operations manager at a busy chiropractic office, has a thriving private coaching practice, and recently launched her own bath and body label. Her passion for helping clients and her experience as a business owner are an asset to the Curriculum Team at HCI.

Whitney Harris, Success Coach

Relevant Experience/Qualifications:

- Institute of Integrative Nutrition, Certified Health Coach & Student Mentor
- Holistic MBA, TCM Mastery Certified Transformational Coaching Method Mastery Coach
- Founder, Your Sacred Steps
- School of Healing Arts, Holistic Health Practitioner

Further Information:

Whitney is a Transformational Coach who specializes in releasing limiting beliefs that hold you back from living the life you truly desire, with a body and career you love. Before joining HCI as a Success Coach, Whitney served clients privately, in groups, facilitating small retreats, and was a Coach for previous graduate trainings Stacey & Carey offered. Her specialties focus on emotional eating, body image issues and the science of intuitive development and expansion. She is also a Medicine Woman adopted by the Lakota Tribe.

Blue Russ, Success Coach

Relevant Experience/Qualifications:

- Arizona State University, Bachelors of Science in Justice Studies
- Institute of Integrative Nutrition, Certified Health Coach
- Holistic MBA, Certified Transformational Coaching Method Mastery Coach
- Health Coach Institute, Become a Health Coach Certificate
- Founder, Blue Russ Health Coaching, LLC

Further Information:

In 2006, Blue dove into the world of coaching as a Job Coach for a non-profit serving the homeless. In 2012, she launched a health coaching practice, incorporating her training and passion for healing. Since then, she's had the honor to work with hundreds of people through private coaching, workshops, online programs, and retreats. In 2015, she began mentoring other healers, and in 2016, joined the Health Coach Institute staff to support students in living out their passion.

Denise McKinney, Success Coach

Relevant Experience/Qualifications:

- New Mexico State University, Bachelors of Science in Criminal Justice
- Health Coach Institute, Become a Health Coach Certificate

Further Information:

Denise is a Transformational Coach who lives to help clients align with their purpose, passion, and deep love of self. After earning her B.S. degree and spending several years in jobs that didn't satisfy her personal and

professional dreams, Denise answered the call of her heart and completed her health coach training with Stacy and Carey.

She continuously pursues additional education, and is currently learning with Stacy Hartmann, founder of Freedom Profits Academy and intuitive business coach; with Todd Herman, founder of the 90 Day Year.

Appendix

Registration

I understand that Health Coach Institute is registered with the State Board of Education in accordance with Section 33-2403, Idaho Code. I also understand that the State Board of Education has not accredited or endorsed any course of study being offered by Health Coach Institute, and that these courses may not be accepted for transfer into any Idaho public postsecondary institution.

Amendment Policy

Information about Health Coach Institute is published in this document, which contains a description of policies, procedures, and other information about the Institute. Health Coach Institute reserves the right to change any provision of the policies and procedures at any time.

Notice of changes will be communicated in a revised document, an addendum or supplement to the policies and procedures, or other written format with an effective date. Students are expected to read and be familiar with the information contained in this document, in any revisions, supplements or addenda. By enrolling in Health Coach Institute, the student agrees to abide by the terms stated within this document

Referenced or Supporting Documentation

The following linked documents are cited within this policy or have been deemed relevant for inclusion:

- HCI Become A Health Coach Program Syllabus
- HCI Holistic MBA Program Syllabus
- HCI Student Code of Conduct
- HCI Course Catalog

Participant Privacy

Student grants HCI the right to collect and use student's personal information for management and marketing purposes. HCI shall not share or sell student's personal information to non-affiliated third parties. Student grants HCI permission to use any of student's oral or written comments for testimonial and marketing purposes.

Student Responsibilities

Student shall conduct themselves honorably, responsibly, respectfully, ethically, and lawfully; and in accordance to HCI policies. Failure to do so shall be considered a breach of these Student Policies & Procedures and HCI may, at its sole discretion, terminate student's access to its course materials and websites. In the event of such a termination, student agrees to immediately cease use of all materials in his or her possession and to destroy or return the same to HCI.

Liability

HCI is not responsible for the failure of student's business in connection with student's use of HCI's services and products. HCI makes no representations or warranties regarding the results that may be achieved by using the its services and products.

Severability/Waiver

If any provision of these Student Policies & Procedures is held illegal or unenforceable in a judicial proceeding, such provision shall be severed and the remainder of these Student Policies & Procedures shall remain operative and binding on student and HCI. Failure to exercise any right under these Student Policies & Procedures shall not constitute a waiver of such right. Any waiver of any breach of these Student Policies & Procedures shall not operate as a waiver of any subsequent breaches.

Interpretation

These Student Policies & Procedures shall be construed as a whole, according to their fair meaning, and not in favor of or against any party. Sections and section headings contained in these Student Policies & Procedures are for reference purposes only, and shall not affect in any manner the meaning or interpretation of these Student Policies & Procedures. Whenever the context requires, references to the singular shall include the plural and the plural the singular and any gender shall include any other gender.

Governing Law and Venue

Any claim or dispute arising out of or relating to student's use of HCI's products and services and these Student Policies & Procedures shall be governed by the laws of the State of New York, without regard to its conflict of law provisions. The parties agree to submit to the personal and exclusive jurisdiction of the federal and state courts located within New York County, New York (including the Southern District of New York). To the fullest extent permitted by law, student hereby waives any right student may have to a trial by jury and to participate in a class action or other proceeding against HCI whereby more than one student participates in the same action.