CHANGE AHEAD

CASE STUDY GUIDANCE

INTERNATIONAL · META · CONSCIOUSNESS · ACADEMY

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1.1 What are Case Studies?

Case studies are sessions conducted as part of a certification process to become recognised as a professionally qualified Practitioner or Coach.

They provide a vehicle to discuss and assess a candidate's EFT skill & understanding, practitioner ability, strengths and development needs.

Case studies also function as a teaching tool intended to help candidates actively notice, reflect upon, and learn from the choices made – and what occurred – during an EFT interaction.

By recounting the EFT interaction or intervention undertaken with clients, certification candidates (called “Practitioner-Candidates” or, simply, “Candidates”) have the opportunity to:

- Demonstrate their understanding of the process
- Develop greater conscious awareness of their choices
- Clearly identify the specific approaches used
- Reflect upon the intended purposes of their chosen approaches
- Observe, more objectively, their role in the EFT interaction
- Reflect upon the results of the session, the quality of their facilitation, etc.

1.2 How are Case Studies Useful?

When a Candidate presents what happened in an EFT intervention from their perspective, and why they made the choices they made, they can more objectively evaluate and discuss their current level of competency together with their Mentor and or Trainer.

Conversely, Trainers and or Mentors can utilize the case study process to accurately assess a Candidate’s skill.

Case Studies are opportunities for constructive engagement between Candidate and the Trainer and or Mentor – on many levels.

For Trainers and or Mentors, the case study process gives them the opportunity to:

- Review the Practitioners skill, ability, decision making, documentation ability and assessment of their own strengths, learning's and development needs
- Learn directly about the decisions and choices made by the Candidate during their EFT intervention in ways that actively promote a Candidate’s professional growth and development

Once the case studies have been reviewed the Trainer and or Mentor has a one to one private interaction with the Candidate where they can:

- Acknowledge strong areas of competency and clearly identify those areas that require improvement
- Give honest, direct feedback from their perspective and experience about what they are witnessing of a Candidate's EFT skills and abilities
- If needed enquire further into their thinking and the reason they performed or did not perform certain techniques, lines of questioning or support in the session
- Share their professional expertise in ways that encourage a Candidate to draw new conclusions and expand her/his skills
- Assess a Candidate's level of competency for certification purposes

Please note a Candidates Practitioner ability is also assessed during Training Practice sessions and Mentoring & Supervision sessions. At the Trainers and or Mentors discretion a one to one interaction can be requested to have a conversation about where the Practitioner is strong or might need more support.

For Practitioner-Candidates, reviewing case study process which includes Mentoring & Supervision affords them the opportunity to:

- Document what they did and the reason they did it
- To become aware of all the different elements of the Case Study from background to interventions and learnings.
- Identify their strengths, development needs and learnings

During Mentoring & Supervision or an interaction initiated between the Mentor & or Trainer, the Candidate can:

- Ask questions and receive feedback regarding specific client work
- Receive a more experienced perspective on their abilities as facilitators of the EFT interaction
- Reflect upon and discuss what they did well, where they were challenged and what they might do differently in the future
- Identify, together with their Mentor and or Trainer, any areas of skill that require improvement
- Brainstorm together potential solutions for areas under discussion
- Openly discuss their challenges, successes and personal experiences in ways that help build, sustain and enhance their professional capacity as EFT practitioners

These are usually structured during the Mentoring & Supervision hours, including a session on how to write up a case study.

Additional one to one interactions might be initiated between the Candidate and or Trainer or Mentor either before or after the Case Studies are submitted.

Should there be additional Mentoring & Supervision required or support in the case study process, the Trainer will appraise the Candidate of what is involved and any charges involved.

1.3 What is the Process?

Once a Candidate completes writing up their case studies, they provide it to their Trainer in one email. The email will contain:

1. 3 sessions conducted on 2 or more (2 sessions per client each submitted in this template. (Each session must be up to 1 hour long and no more than 1.5 hours with an Intake Form completed prior to commencing sessions);
2. 1 case study on yourself as self-help sessions in this template. Self-help either can be done by yourself or with a practitioner. (Each session must be up to 1 hour long and no more than 1.5 hours. For self-help sessions, it will be a self Intake Form where you evaluate what you want);
3. 50 practice sessions log on a minimum of 20 clients. (Each session must be upto 1 hour long and no more than 1.5 hours with an Intake Form Completed prior to commencing sessions with details of your Mentoring Supervision hours);
4. 1 page write up about your personal EFT Journey from attending the initial training to submitting you case studies and must include your reflections from the one to one professional sessions;
5. 1 one hour video or audio of giving a case study client session;
6. Complete the multiple task online through ETFi. Here's the link: https://eftinternational.org/membership-information/membership-join/

7. Confirmation that you will adhere to the Code of Conduct and Continuing Professional Development requirements, including 6 hours of Supervision mentoring annually;

The trainer takes 6-8 weeks to review everything. They might have a question and ask for further work. Once the further work is submitted, it can again take up to 6-8 weeks to review everything. There is an additional cost worth £200 and you are encourage to book in a 90 min session via Penny Croal's calendar. Please click the link and click "ADD TO BASKET" to add the service in your cart and proceed to check out to fill in your payment details.

2. PREPARING A CASE STUDY

2.1 Background Information

The first section of your Case Study will present your client's basic background. You can include factors such as age, gender, work, health status, mental health history, drug and alcohol history, life difficulties, goals and coping skills etc.

2.2 Description of the Presenting Problem

In the next section of your case study you will describe the problem or symptoms that the client presents with. Describe any physical, emotional or sensory symptoms reported by the client. Thoughts, feelings, and perceptions related to the symptoms should also be noted.

Any screening tools (PHQ9, GAD, HAD, SUD etc) or diagnostic assessments that are used should also be described in detail and all scores reported.

Please include use of intake questionnaire and clarify the problem the client wants to resolve.

2.3 Assessment

Provide your overall impression and give the appropriate assessment. Explain how you reached your assessment, how the client's symptoms were presented, etc.

2.4 Intervention

Explain what methods you used to bring down the SUD or understand the problem at a deeper level. For example:

<u>FOR EFT PRACTITIONER (LEVEL 2)</u>

- Full EFT routine (full basic recipe)
- Movie technique
- Tell the story
- Fears & phobias
- Limiting beliefs
- Key word
- Use of questions
- Telephone or Skype work
- Working with children and teenagers
- Surrogate working
- Explanation of EFT and its effects

- Observation of client state
- Describe some (not all) set up phrases that were used: e.g. ‘even though’, etc.

2.5 Outcome

The outcome of the session need not necessarily be a successful one, especially as you will only be conducting a few sessions. The important factor is how you demonstrate the techniques and skills you’ve been taught and your judgement in selecting which ones to use at which times during a session.

An example of a successful outcome may be measured by achieving the client’s goal (say being able to fly on a plane) or reducing their levels of anxiety and maintaining that level when they return for their next session. An unsuccessful outcome may well be your greatest teaching moment; please describe what was learned from the session and what will be done differently in similar circumstances.’ (See Section 6 for more on this.)

2.6 Post session review

In this section write your reflections on:

- What you did really well?
- What could you do even better?
- What would you do differently next time?
- Overall what were your learnings?
- What were your learnings about the process?

- What were your learnings about yourself as an EFT Practitioner in training?

At the end of each session:

At the end of each session jot down brief notes which will enable you to write detailed notes later for your records and give yourself time for self-reflection.

The Issue, presenting problem or what the client wants

- Questions Asked
- Tapping Sequences Use
- Techniques Used
- How did you overcome the challenges?
- What made you decide to do what when?
- What did you do well?
- What can you do better?
- What would you do differently next time?
- What are your overall learnings?

3. HOW CASE STUDIES ARE EVALUATED/ MARKED?

3.1 Client Case Studies

Before certifying a Practitioner- or Advanced Practitioner-Candidate, a Trainer and or Mentor critically evaluates each case study to ensure that a Candidate has grasped the skills taught in the relevant course level.

While no case study will necessarily include all of the following criteria, Mentors will want to see just how effectively a Candidate:

- Identified her/his client's presenting issue(s) and goal(s)
- Handled abreactions or overwhelms
- Demonstrated knowledge of when and how to ask appropriate, quality questions
- Understood and handled the need to reduce the Intensity/SUDs/VOC Levels that arose during session(s)
- Undertook every opportunity to be gentle and avoid retraumatising the client
- Recognized how and when a client displayed a Reframe or Cognitive Shift
- Displayed how Cognitive Shifts (or "Client Reframes") were integrated
- Undertook appropriate opportunities to Measure and Test their work
- Describe the role of any Reversals present and how you handled these Aspects (i.e. secondary gain/loss, etc.).
- Displayed thoroughness (as well as variety) of Measuring and Testing opportunities
- Professionally managed and contained the EFT process
- Built Rapport, safety and trust with clients and handled any challenges in this area (projection, transference, etc.)
- Listened to their clients, reflected their subjective experience and worked with what they were bringing to the table.

- Maintained a non-judgmental stance (displayed ability to "get themselves out of the way") during the EFT interaction (i.e. the concept of "through me, not by me")
- Utilized effective and appropriate Reframing
- Uncovered, handled or otherwise acknowledged Core Issues* and their relationship to the presenting issues as well as Specific Past Events
- Discerned any need to refer out, recognized areas where they lacked expertise or otherwise demonstrated understanding the concept of "Do Not Go Where You Don't Belong"
- Opened and closed sessions appropriately (i.e. demonstrated ability to end session(s) safely and on time, and knowledge of what to do with any extra time at the end of the session (more testing, assigning homework, or more tapping if appropriate, etc.)
- Addressed and/or acknowledged any ethical concerns or issues that may have arisen
- Communicated ample self-reflection about the process.

*If, for example, during a single session, no Core Issues arose or there was difficulty clearly identifying or resolving them, the Mentor will want to ascertain a Candidate's understanding of the relationship between what did unfold in this session and "getting to the core."

3.2 What to identify in the Case Studies?

When writing up the Case Studies definitely explain the following:

- Identify the particular feeling, memory, belief or situation that is a problem for the client;
- Agree on the goals/desired outcome;
- Introduce any safety techniques;
- Decide on the EFT techniques to be used;
- Indicate what phrases you used to bring about a change in the SUD level;
- Ability to establish boundaries;
- Knowledge and understanding of principles, theories and techniques of EFT;
- How you explained EFT to the client and how you initially demonstrated it to them;
- How you isolated issues to be worked;
- If PR was present and, if so, how it was neutralized;
- What set-up affirmations were used and how you decided what words to use;
- The reminder phrases that were used;
- Which points were tapped - a full sequence or shortcuts;
- The methods used to address the issues and why these were chosen;
- How far the issue was resolved, and how this was assessed;
- If partial resolution of an issue occurred, what you did next;
- What testing methods you used;
- Whether there were any shifts of aspect or issue;
- Whether there were any cognitive shifts;
- Which questions were asked to reach deeper levels of issues;
- How affirmations were framed and reframed;

The Trainer will need to be assured that students know when and how to ask appropriate questions to reduce the SUD scale and bring about a cognitive shift, how well they have understood a client's presenting issues and how to handle any abreactions or overwhelms. Trainers will be establishing whether students are able to build rapport with a client and how they have handled an abreaction, shifting aspects, etc.

If needed, notes should be made during the session as a reminder, or you can ask permission to record during the session and then write more notes down immediately after the session.

If you have any questions, please consult with your Trainer/Supervisor.

3.3 Skills that your Trainer will be looking for at Practitioner candidate level:

Example:

1. Questioning skills
    - What does that feeling remind you of?
    - Where do you feel that right now?
    - What SUDs level is it?

2. How is the Practitioner getting the information?
    - Is the client's body language being noticed?
    - Are appropriate listening skills being used?

3. Is the Practitioner keeping the client safe by:

- Not INFLUENCING the client’s words
- Utilising any safety techniques
- Being respectful of the client in all ways
- Being non-judgemental.
- Being aware of anything they were triggered by during the session
- Explaining what the client feels now is a trigger and not what is happening now.

4. Does the Practitioner notice any projections or counter transferences taking place?

5. Is the Practitioner using a variety of measurement tools (SUD, VAKOGS etc.)?

6. Is the Practitioner fully aware of ‘aspects’?

7. Is the Practitioner moving with each aspect as it comes up but remembering to go back to the original aspect to check it’s been cleared?

8. Is the Practitioner being specific enough?

9. Is the Practitioner going with the client and their beliefs or are they putting on their own interpretations?

10. Is the Practitioner testing sufficiently to establish if the emotion has been neutralised?

11. Is the Practitioner being ‘present’ at all times in the session giving their client full connection and focus?

12. Is the Practitioner being aware of the ‘clock’ time & 10 minutes from the end mentioning there is 10 minutes left in order to prepare the client’s subconscious and avoid any new issues arising?

13. Were issues isolated?

14. How was the issue resolved?

15. If there was partial resolution, what did the Practitioner do next?

16. Were there any cognitive shifts?

17. What techniques were used (use the skills appropriate to the client session – which can vary session by session).

For example:

- Tell the story
- Continuous tapping
- Movie technique
- Tearless trauma
- Aspects uncovered
- Limiting beliefs
- Sneaking up on a problem
- Key word approach

- Specific questions or techniques used to get to the core issue
- Argument tapping
- Surrogate tapping
- Rapport building
- Preparing intake/consultation form
- Explanation about EFT and its effects
- Observation of client state
- Use of measurement tools

3.4 Recommended session times

All session times should be limited to 1 hour and no more than 1 hour 30 minutes.

The first session will usually include a consultation so add approximately 20-30mins extra time for this OR alternatively consultation at a previous meeting

3.5 Information on the Case Study requirements for Practitioner level

For Practitioner Level: Students are required to submit 4 sessions on 2 clients and 2 session on self.

Notes

- The case studies must be of a standard that demonstrates knowledge, skills and competence at the relevant Practitioner level.

- If you have any questions around Case Studies, please contact your Trainer
- All case studies are to be submitted to your Trainer within 12 months and within 6 months is preferable of attending the relevant training course or the date on the attendance certificate. If there are any problems in this area, first speak with your Trainer.
- Your Trainer has the discretion to ask for these sessions to be submitted in one or more formats (ie written, recorded, filmed).
- Written case studies should follow the format included in this Guidance.
- The studies should demonstrate an in-depth exploration of issues and competent use of EFT techniques. One session can be on your own issues.
- Multiple issues and physical and emotional issues may occur in the same session. It is not necessary for a session to be successful: You can sometimes learn a great deal from analysing what didn't go so well. It is perfectly satisfactory to present a session in which you did not achieve complete resolution of the issues.

3.6 Informed Consent

Please obtain consent from the relevant person to use any written or recorded material from the session in your case study before you begin.

Inform them that you are learning EFT and that you will need to submit your notes for assessment to establish your competence.

Reassure them of complete confidentiality at all times and that their real identity or any circumstances which might identify them will not be included.

4. PREPARING A PERSONAL CASE STUDY WRITE UP

4.1 How to write up a Personal or Self-help Case Study

How someone finds their way to tapping for personal issues is always highly individualized. Whether the approach is to:

- Journal their Personal Peace Procedure (or adaptation) at set times several times per week
- Write and tap stream of consciousness several times per day
- Identify areas of stress in the body as a personal ritual before bedtime
- Personalised methods used can find their way into a Personal Case Study. You can work with another practitioner if you want.

Just as in Client Case Studies, Personal Case Studies involve clearly defining an issue or problem to explore, and sharing the resulting “tapping journey” in a detailed write-up for discussion with the Trainer and or Mentor.

The Personal case studies, just like client case studies, are hour long sessions and no more than 1 hour 30 minutes.

Writing a Personal Case Study is a two-part exercise:

- Firstly, the Candidate works through their presenting issue, problem or limitation in a way and time that is uniquely their own (see full description above). Candidates can do their own tapping or work together with another person.
- Next, once the personal tapping process is complete, the Candidate writes-up their experience and communicates how foundational (and/or advanced) EFT skills were employed. This process is very similar to a Client Case Study – where the client is you. The case must include relevant background, insights gained, techniques used and written up as a Case Study .

The case study needs to include a write up for each sections:

- Background Information (about the client)
- Description of the presenting problem (the reason the client came to see you)
- Assessment (your assessment)
- Explanation (how you explained what would happen during the session)
- Desired goal or change wanted (from your client)
- Intervention (what you facilitated during the session)
- Outcome (what happened at the end of the session or client feedback during or after the session, including any testimonials)

- Future planning (what you would propose in your next session)
- Post session review and learning outcomes (your reflections and what you learned)

4.2 Assessment of Personal Case Studies

Assessment of Personal Case Studies will be focused upon how thoroughly and successfully a Candidate was able to use the EFT toolbox on her/his own behalf.

This is a different EFT skillset than helping others, as it can be challenging to ask ourselves the curious questions, we might easily ask of someone else.

Personal Case Studies are designed to encourage thorough self-exploration and self-reflection using EFT as the primary tool.

- As in Client Case Studies, Trainers & or Mentors will be looking to verify that a Candidate:
- Has sufficiently identified a personal issue
- Addressed the presenting aspects
- Tapped on any body sensations, snuck up/away when necessary
- Identified and handled Core Issues (including Specific Past Events)
- Thoroughly measured and tested the results along the way

As in any thorough case study, Trainers and or Mentors will be looking for specific ways in which Level 1, Level 2 (and/or Level 3) EFT was applied.

At each level of practice, Mentors will be assessing Candidates' understanding of how their unique tapping exploration specifically relates to foundational and/or advanced EFT skills.

5. RECORDING FOR CASE STUDIES

5.1 The Template for Recording EFT Case Study Sessions

For EFT Practitioner Level

Name of EFT Student	
Date of Session	
Length of Session	
Client id (if applicable)	
Gender	
Case Study Number	
Session Number	

Case Study Notes

Each session should include:

- How you got to the core issue?
- What techniques were used?
- How the SUD rating changed?
- Examples of techniques used taught at EFT Practitioner (Level 2).

- What set up phrases, questions and tapping sequences were used?
- What specifically made the difference during the one on one session?
- Any testimonials or client feedback you have.
- Most importantly, add your learning at the end; what you have learnt about yourself, the process and your client.
- Focus on the process and what you learnt.
- Consider yourself as a facilitator creating a space of safety, allowing non-judgemental listening and be compassionate by staying focused on the reason your client came to see you.

Background Information (about the client):

Intake attached

Description of the presenting problem (the reason the client came to see you):

Assessment (your assessment):

Explanation (how you explained what would happen during the session):

Desired goal or change wanted (from your client):

Intervention (what you facilitated during the session):

Outcome (what happened at the end of the session or client feedback during or after the session, including any testimonials):

Future planning (what you would propose in your next session):

Post session review and learning outcomes (your reflections and what you learned):