



LEADZUS, LLC  
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# Coaching to Advance Leader Development

## Faculty and Participant Policy Guide



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## Coaching to Advance Leader Development

### Participation Policy

Successful participation in LEADZUS, LLC programs, including Coaching to Advance Leader Development (CALD), requires consistent engagement, professional conduct, and accountability for learning.

By enrolling, participants agree to be fully present and actively engaged in all scheduled learning activities. This includes arriving on time, participating in course activities, complying with the Code of Conduct, and meeting all program requirements.

### Attendance

To meet International Coaching Federation training and mentor coaching requirements, participants are expected to attend all scheduled instructional and mentor coaching sessions.

If a participant experiences an illness or emergency that prevents attendance, the participant must notify the instructor and LEADZUS, LLC as soon as possible. Participants are responsible for completing all required make-up activities associated with missed sessions, which may include reviewing session recordings, completing assigned materials, and participating in alternative learning or coaching activities as determined by the program.

### Attendance thresholds:

- Missing up to 4 hours of synchronous instruction  
Participants may be permitted to complete approved make-up work to remain in compliance with program requirements.
- Missing more than 4 hours of synchronous instruction  
Participants may be required to complete additional instructional time at their own expense or transfer to a future cohort, subject to availability.
- Mentor coaching  
CALD provides 10 hours of group mentor coaching and 3 hours of individual mentor coaching. All individual mentor coaching hours are required. Missed mentor coaching hours must be replaced to ensure compliance with ICF minimum requirements, which may require additional individual mentor coaching at the participant's expense.

Petitions for exceptions must be submitted in writing and are reviewed on a case-by-case basis.

### Course Engagement



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CALD courses are designed to be interactive and experiential. Participants are expected to engage in dialogue, practice coaching skills, participate in experiential exercises, and collaborate with peers. If a participant is unable to engage fully in a specific activity, the participant should inform the instructor as soon as possible so appropriate alternatives can be considered.

## **Code of Conduct and Behavior Standards**

LEADZUS, LLC is committed to maintaining a professional, respectful, and psychologically safe learning environment. Participation in CALD requires behavior consistent with the standards of professional coaching, adult learning, and ethical practice.

By enrolling, participants agree to adhere to the following expectations.

### **Expected Behaviors**

Participants are expected to:

- Attend sessions on time and remain present for the full duration
- Engage respectfully with instructors, coaches, staff, and peers
- Participate actively in discussions, exercises, and coaching practice
- Maintain confidentiality of peer coaching conversations and shared experiences
- Communicate with honesty, integrity, and professionalism
- Accept feedback in the spirit of learning and development
- Follow all program policies and instructions
- Use technology responsibly during sessions

### **Prohibited Behaviors**

The following behaviors are not permitted and may result in disciplinary action:

- Harassment, discrimination, or disrespectful conduct toward any participant, faculty member, coach, or staff member
- Disruptive behavior that interferes with learning, including persistent side conversations, excessive multitasking, or refusal to engage
- Use of abusive, threatening, or demeaning language, whether verbal or written
- Violations of confidentiality
- Dishonesty, misrepresentation, or falsification of assignments or documentation
- Repeated failure to meet participation or attendance expectations
- Inappropriate use of chat, email, or virtual platforms
- Recording sessions or sharing program materials without permission
- Behavior that undermines psychological safety or group trust



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## Warning and Disciplinary Process

LEADZUS, LLC uses a progressive response model when addressing conduct concerns, unless the severity of the behavior warrants immediate action.

### Step 1. Verbal or written warning

The participant will be notified of the concern and the expected corrective behavior.

### Step 2. Final written warning

If the behavior continues or recurs, a final written warning will be issued outlining consequences for further violations.

### Step 3. Removal from the program

If behavior persists, or if conduct is deemed severe, the participant may be removed from the program.

## Immediate Removal

LEADZUS, LLC reserves the right to remove a participant immediately, without prior warning, for serious violations including but not limited to harassment, threats, discrimination, breach of confidentiality, or conduct that jeopardizes the safety or learning environment.

## No Refund Policy

Removal from the program for violations of this Code of Conduct will result in forfeiture of all tuition and fees. No refunds or credits will be issued.

Removal for conduct reasons does not constitute program completion and may affect eligibility for certificates, documentation of hours, or future enrollment.

All determinations are made at the sole discretion of LEADZUS, LLC to protect program integrity and participant safety.



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## Coaching to Advance Leader Development

### Statement on Ethics, Integrity, Transparency

LEADZUS, LLC and its Coaching to Advance Leader Development (CALD) program are grounded in the ethics of professional coaching. Ethical awareness, judgment, and conduct are not treated as standalone requirements, but as core capabilities developed throughout the learning experience.

As an International Coaching Federation accredited provider, LEADZUS, LLC aligns with and upholds the ICF Code of Ethics. These standards inform curriculum design, coaching practice, assessment, mentor coaching, and evaluation. Ethical decision-making is integrated across learning activities, case discussions, coaching practice, and reflective work to ensure participants can recognize ethical dilemmas, manage power and boundaries, and act in service of the client.

CALD emphasizes ethics as lived practice. Participants are expected to demonstrate ethical conduct in coaching engagements, peer interactions, use of feedback, confidentiality, and representation of their coaching capabilities. Ethical competence is treated as foundational to trust, safety, and effective coaching relationships.

LEADZUS, LLC commits to integrity and transparency in how programs are marketed, priced, delivered, and evaluated. Program requirements, outcomes, costs, and limitations are communicated clearly and accurately. We do not engage in deceptive, manipulative, or high-pressure sales practices. Enrollment decisions should be informed, voluntary, and aligned with participant readiness and intent.

Faculty, mentors, assessors, and contractors are held to the same ethical standards and are expected to model ethical behavior consistent with professional coaching practice.

Ethical alignment is a condition of participation. Failure to adhere to ethical expectations may result in corrective action, up to and including removal from the program.



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## **Coaching to Advance Leader Development**

### **DEIB Statement**

#### **ICF Statement of Diversity, Equity, Inclusion, and Belonging (2023)**

The International Coaching Federation places diversity, equity, inclusion, and belonging at the forefront of everything we do. We commit to valuing the unique talents, insights, and experiences that every coach and client brings to the world. To that end, we have established the Global Diversity Council to oversee, support, and influence our stakeholders to reflect on our blind spots and be aware of opportunities for improvement.

#### **ICF Statement of Diversity and Inclusion (2020)**

The ICF Global Board of Directors approved the ICF Statement of Diversity, Inclusion, Belonging and Justice in July 2020. Staff and volunteer leaders from ICF's six family organizations subsequently cosigned the statement. This statement of principles reflects a position we invite every ICF Member, Credential-holder and accredited provider to subscribe to.

ICF Members and Credential-holders live and work in more than 140 countries and territories. ICF is a vibrant global community committed to the shared vision of making coaching an integral part of a thriving society. Our mission is to lead the global advancement of coaching. To do this, we must reflect on our blind spots and be aware of opportunities for improvement. We cannot ignore the challenges that many coaches and coaching clients face due to systemic problems in their communities.

As members of the ICF community, we ascribe to the core values of integrity, excellence, collaboration and respect. The foundation of these values is a shared commitment to diversity, inclusion, belonging and justice.

We will place diversity, inclusion, belonging and justice at the forefront of every decision we make within our Association. As we continue the journey toward our vision, we will recommit ourselves to valuing the unique talents, insights and experiences that every coach and client brings to the world.

#### **LEADZ/CALD Diversity, Equity, Inclusion, and Belonging (2026)**

LEADZUS, LLC and its Coaching to Advance Leader Development (CALD) program affirm our commitment to Diversity, Equity, Inclusion, and Belonging (DEIB) as essential to ethical coaching, leader development, and effective learning.



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We align with the ICF Statements of Diversity, Inclusion, and Belonging approved in 2023 and the ICF Statement of Diversity, Inclusion, Belonging and Justice in July 2020, which places DEIB at the forefront of the coaching profession. We commit to valuing the unique talents, insights, and lived experiences that every coach and client brings to the learning environment.

LEADZ serves leaders and coaches across sectors, roles, identities, and cultural contexts. We recognize that blind spots exist at individual, organizational, and systemic levels. Consistent with ICF's intent, we commit to reflection, feedback, and continuous improvement in how our programs are designed, delivered, assessed, and governed.

Within CALD, DEIB principles are intentionally embedded across curriculum design, faculty and coach selection, participant engagement, assessment practices, and learning partnerships. We emphasize equity of access, psychological safety, and respect for difference as conditions for meaningful development.

This commitment is ongoing. We will regularly review policies, learning experiences, and outcomes to ensure alignment with our values, professional standards, and the evolving needs of our community.

## **Non-Discrimination Policy**

It is the policy of LEADZUS, LLC that:

- Recruitment, selection, engagement, and advancement of employees, faculty, coaches, contractors, and volunteers are conducted without discrimination based on race, color, age, religion, creed, national origin, ethnicity, sex, sexual orientation, gender identity or expression, marital status, disability, veteran status, or any other status protected by applicable law.
- All participants in LEADZ and CALD programs are afforded equal access to learning, coaching, evaluation, and professional development opportunities.
- Discrimination, harassment, or retaliation by any employee, faculty member, coach, participant, volunteer, contractor, visitor, or vendor is prohibited and will not be tolerated.
- LEADZUS, LLC is committed to maintaining learning environments that support psychological safety, respectful dialogue, and professional accountability.

Participants, faculty, or staff who experience or observe behavior inconsistent with this policy are encouraged to report concerns through the grievance process outlined in the Faculty and Participant Policies Guide. Reports will be reviewed promptly, confidentially where possible, and addressed in a manner consistent with organizational policy and applicable law.



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## **Coaching to Advance Leader Development**

## **General Disability and Accommodation Policy**

LEADZUS, LLC is committed to providing equitable access to its programs for qualified individuals with disabilities. We prohibit discrimination on the basis of disability and provide reasonable accommodations in accordance with applicable federal, state, and local laws.

Our goal is to create learning environments that support access, participation, and meaningful engagement. Reasonable accommodations may include adjustments to instructional methods, materials, or learning formats, where such accommodations do not fundamentally alter program requirements or impose undue burden.

Participants who wish to request accommodation(s) should do so as early as possible and prior to enrollment when feasible. Accommodation requests will be reviewed on a case-by-case basis to determine what can reasonably be provided within the structure and requirements of the program.

Accommodation requests or questions may be directed to:  
Chief Operating Officer  
[info@leadzcoach.com](mailto:info@leadzcoach.com)  
(202) 306-4144

If a requested accommodation(s) cannot be reasonably provided, LEADZUS, LLC will communicate this determination clearly and promptly and, when possible, discuss alternative options or resources.



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## Coaching to Advance Leader Development

### Grievance Policy

LEADZUS, LLC is committed to fair, respectful, and timely resolution of participant concerns. We encourage open communication and provide a clear process for raising and addressing grievances related to program content, instructional delivery, learning environment, faculty or coach conduct, or administrative practices.

Participants have the right to submit a grievance without fear of retaliation.

### GRIEVANCE PROCESS

#### **Step 1. Informal resolution**

When appropriate and safe to do so, participants are encouraged to first address concerns directly with the individual involved, such as a faculty member, coach, staff member, or participant. This step is optional.

#### **Step 2. Formal grievance**

If informal resolution is not appropriate, not comfortable, or unsuccessful, participants may submit a written grievance within 5 calendar days of the incident or concern. Grievances should be submitted to the Program Manager and include a description of the issue, relevant dates, and desired outcome.

The Program Manager will acknowledge receipt within 5 calendar days and will review the grievance, gather relevant information, and engage involved parties as appropriate to seek resolution.

#### **Step 3. Appeal**

If the participant believes the grievance has not been adequately resolved, a written appeal may be submitted within 5 calendar days of the resolution decision. Appeals should include the original grievance and the basis for the appeal.

Appeals should be directed to:  
Chief Operating Officer  
[info@leadzcoach.com](mailto:info@leadzcoach.com)  
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Appeals will be reviewed, and a written determination will be provided within 15 calendar days. Appeal decisions are final.



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## Coaching to Advance Leader Development

### Illness Policy

To meet International Coaching Federation training and mentor coaching requirements, full participation in all scheduled sessions is required.

If a participant becomes ill or experiences an emergency that prevents attendance at a scheduled session, the participant must notify the instructor and LEADZUS, LLC as soon as possible. Participants are responsible for completing all required learning activities associated with the missed session, which may include reviewing session recordings, completing assigned materials, and participating in a make-up coaching or learning activity as determined by the program.

Absence thresholds and make-up requirements:

- Missing up to 4 hours of synchronous instruction  
Participants may be permitted to complete assigned make-up work to satisfy program requirements, subject to instructor approval.
- Missing more than 4 hours of synchronous instruction  
Participants may be required to complete additional instructional time at their own expense or transfer to a future cohort, subject to availability.

CALD exceeds these requirements by providing a total of 13 hours of mentor coaching, consisting of:

- 10 hours of group mentor coaching
- 3 hours of individual mentor coaching

These hours are structured to support skill development, reflective practice, and readiness for credentialing, while ensuring compliance with ICF standards.

Attendance and completion requirements:

- Group mentor coaching  
Participants are expected to attend all scheduled group mentor coaching sessions. Missed group sessions must be made up through additional mentor coaching activities, which may require individual sessions at the participant's expense to ensure minimum required hours are met.
- Individual mentor coaching  
All three hours of individual mentor coaching provided by CALD are required. If a participant misses any individual mentor coaching session, the participant is responsible for arranging and paying for replacement individual mentor coaching hours to meet the minimum ICF requirement.



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All determinations are made to ensure alignment with ICF requirements and program learning outcomes.

Petitions for exceptions to this policy will be reviewed on a case-by-case basis and must be submitted in writing to the instructor and LEADZUS, LLC.



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## **Coaching to Advance Leader Development**

### **Partial Completion and Credit Policy**

LEADZUS, LLC may grant credit for partial completion of a course when a participant has completed a verifiable portion of the curriculum but does not complete the full program.

Partial credit, when granted, reflects only the number of instructional hours actually completed and documented. Partial credit does not constitute program completion, certification, credential eligibility, or satisfaction of International Coaching Federation requirements unless explicitly stated.

Participants seeking partial completion credit must submit a written request within 10 calendar days of the course end date. Requests should include the course name, cohort, dates of participation, number of hours completed, and reason for non-completion.

Requests should be directed to:  
Chief Operating Officer  
[info@leadzcoach.com](mailto:info@leadzcoach.com)

If approved, LEADZUS, LLC will issue a certificate indicating the number of training hours completed.

LEADZUS, LLC reserves the right to deny partial completion credit when program integrity, accreditation standards, or documentation requirements cannot be met.



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# Coaching to Advance Leader Development

## Payment, Fees, and Refund Policy

### Payment and Registration

Program registration is confirmed on a first-come, first-served basis and is not secured until full payment is received. All fees must be paid in U.S. dollars.

Accepted payment methods may include credit card, ACH, or check, as specified at the time of registration.

### Refund and Cancellation

- Cancellations received at least 30 calendar days prior to the program start date are eligible for a full refund.
- Cancellations received fewer than 30 calendar days prior to the program start date are not eligible for a refund.

Written notice of cancellation must be submitted to LEADZUS, LLC and is effective on the date received. Approved refunds will be issued within 30 calendar days of receipt of the cancellation request.

No refunds will be issued for participants removed from the program for policy or conduct violations.

### Registration Modifications and Transfers

Requests to modify a registration, including participant substitution or transfer to a different cohort, must be submitted no later than 7 calendar days prior to the program start date.

Transfers and substitutions are subject to availability and program approval. LEADZUS, LLC reserves the right to deny modification requests that would compromise program integrity or accreditation requirements.

Requests to modify a registration or transfer to another cohort do not alter the Refund and Cancellation Policy. Modification or transfer requests submitted fewer than 30 calendar days prior to the program start date are subject to the same refund restrictions as cancellations.

If a modification or transfer request is submitted fewer than 30 calendar days prior to the program start date and cannot be accommodated, the registration will remain subject to the no-refund policy.

Approval of any modification or transfer request is not guaranteed and is contingent upon availability and program requirements.



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## Coaching to Advance Leader Development

### Transfer of External Credit Policy

LEADZUS, LLC does not accept transfer credit or partial credit from other organizations, programs, or training providers toward completion of its programs, including Coaching to Advance Leader Development (CALD).

Completion of prior coaching education, including ICF Level 1 or Level 2 programs, does not substitute for any portion of CALD curriculum, mentor coaching, assessment, or instructional requirements. All participants must complete the full CALD program to receive credit, documentation of hours, or program completion recognition.

This policy ensures instructional consistency, assessment integrity, and alignment with CALD learning outcomes and accreditation standards.

#### Future Program Progression and Credit

LEADZUS, LLC may develop additional coaching education programs that build upon or extend existing curricula, including, but not limited to, potential ICF Level 2 program.

Eligibility, prerequisites, and any recognition of prior LEADZUS, LLC coursework for future programs will be defined at the time such programs are offered. Completion of a LEADZUS, LLC program does not guarantee eligibility for, admission to, or credit within any future program unless explicitly stated in the program's published requirements.

No assumptions should be made regarding automatic progression, transfer, or credit recognition between programs unless formally documented by LEADZUS, LLC.



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## Coaching to Advance Leader Development

### Virtual Learning Privacy, Recording, and Image Use Policy

LEADZUS, LLC is committed to maintaining a professional, ethical, and psychologically safe learning environment in all virtual and hybrid offerings, including the Coaching to Advance Leader Development (CALD) program.

This policy governs privacy, recording, image use, and confidentiality during CALD sessions and applies to all participants, faculty, mentors, assessors, observers, contractors, and guests.

#### Purpose and Context

CALD is an ICF-accredited coach education program that relies on reflective practice, observed coaching, feedback, and experiential learning. These activities require trust, confidentiality, and clear boundaries regarding the capture and use of visual and audio materials.

This policy operates in conjunction with the following LEADZUS, LLC policies:

- Statement on Ethics, Integrity, and Transparency
- Participation and Engagement Policy
- Code of Conduct and Behavior Standards
- Grievance Policy
- Non-Discrimination and Disability Accommodation Policies

#### Organizational Recording Use

By enrolling in CALD, participants acknowledge and consent to limited recording, screenshots, or image capture by LEADZUS, LLC or its authorized representatives for the following internal purposes only:

- Instructional continuity and educational review
- Faculty supervision, mentor coaching, and assessor calibration
- Program quality assurance and accreditation documentation
- Internal training and program improvement

All such materials are treated as confidential educational records and are stored and accessed in accordance with organizational data protection practices.

Identifiable participant images, audio, or video will not be used for external marketing, promotional, or advertising purposes without separate, explicit, written consent provided through a



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standalone media release. Participation in CALD is not contingent upon granting such consent.

## **Participation Recording and Image Use**

Participants may not take screenshots, photographs, audio recordings, or video recordings of any CALD session or activity, including but not limited to:

- Other participants
- Faculty, mentors, assessors, or staff
- Coaching demonstrations or practice sessions
- Breakout rooms or observed coaching
- Shared materials containing participant identities or personal disclosures

unless prior written authorization has been obtained from all individuals depicted and from LEADZUS, LLC.

Participants may not distribute, publish, post, transmit, or otherwise share any CALD-related images, recordings, or screenshots outside the program environment without written approval from LEADZUS, LLC. This includes sharing through social media, messaging platforms, websites, presentations, or professional portfolios.

## **Confidentiality and Ethical Obligations**

Participants acknowledge that CALD includes personal reflection, coaching practice, feedback, and observed coaching.

Consistent with the Statement on Ethics, Integrity, and Transparency and the ICF Code of Ethics, participants are required to maintain confidentiality of all personal information, coaching conversations, and participant disclosures encountered during the program, regardless of format or medium.

Breach of confidentiality or misuse of recordings or images constitutes a violation of ethical and participation standards.

## **Enforcement and Consequences**

Unauthorized recording, image capture, or distribution is a violation of this policy, the Code of Conduct and Behavior Standards, and participation requirements.

Violations may result in corrective action, up to and including:

- Removal from a session
- Removal from the program
- Invalidation of instructional or mentor coaching hours
- Denial of completion documentation



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- Removal without refund
- Reporting of ethical violations where applicable

LEADZUS, LLC is not responsible for unauthorized actions taken by participants in violation of this policy. Individuals engaging in such conduct assume full responsibility for resulting consequences.

## **Psychological Safety Practices**

To support ethical participation and psychological safety, CALD may implement the following practices:

- Advance notice when organizational recording occurs
- Pausing recordings during experiential or reflective activities
- Required camera use during assessment or observed coaching
- Alternative participation arrangements when feasible and appropriate

Participants with concerns related to privacy, participation, or accommodations are encouraged to contact program leadership in accordance with the Grievance Policy and Disability Accommodation Policy.

## **Acknowledgement**

Access to any CALD virtual learning platform, and participation in any CALD session or activity, constitute acknowledgment of and agreement to comply with this policy. Failure to adhere to this policy may result in enforcement action as outlined herein, including removal from the program without refund.



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# Coaching to Advance Leader Development

## CALD Data Protection and Privacy Policy

### Purpose

This policy explains how LEADZUS LLC collects, uses, stores, shares, and protects participant personal data in connection with the CALD program. It governs administrative and educational data handling and operates alongside the CALD Virtual Learning Privacy, Recording, and Image Use Policy, which addresses recording and session confidentiality practices.

### Scope

Applies to all CALD applicants, participants, alumni, faculty, assessors, mentors, and contractors whose personal data is processed in connection with program administration.

### Data Controller

LEADZUS LLC is the data controller for CALD participant information.

### Categories of Data Collected

- Identification data
- Name
- Contact information
- Mailing address
- Email address
- Phone number
- Program participation data
- Enrollment status
- Attendance records
- Assessment outcomes
- Completion status
- Educational and credentialing data
- Coaching recordings submitted for assessment
- Evaluation feedback
- Credential pathway documentation
- Technical data
- Virtual platform participation logs
- System access information

CALD does not collect personal data beyond what is necessary to deliver coach education and meet accreditation requirements.



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## Lawful Basis for Processing

Participant data is processed under one or more of the following lawful bases

- Contractual necessity
  - Program delivery, assessment, mentoring, certification documentation
- Legitimate educational interest
  - Program quality, accreditation compliance, faculty supervision
- Legal and accreditation obligations
  - Reporting required by accrediting or credentialing bodies
- Explicit consent
  - Recording use beyond internal education
  - Photo or marketing use
  - Sharing data with external credentialing bodies when opt in is required

## Purpose of Data Use

Data is used only to:

- Administer enrollment and participation
- Deliver instruction and assessment
- Support mentor coaching and faculty supervision
- Maintain accreditation and quality assurance documentation
- Verify program completion for credentialing
- Communicate essential program information

CALD does not sell participant data.

## Data Sharing

Data may be shared only with

- Program faculty, mentors, and assessors
- Authorized contractors supporting program delivery
- Accreditation and credentialing organizations such as the International Coaching Federation when required or when participant consent is provided

Shared data is limited to what is necessary for the stated purpose.



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## Data Retention

Participant data is retained only as long as necessary to:

- Meet accreditation audit requirements
- Support credential verification
- Maintain educational records

Retention periods are based on educational and accreditation standards. Data is securely disposed of when no longer required.

## Data Security

LEADZUS LLC implements administrative, technical, and organizational safeguards to protect personal data, including:

- Restricted access to authorized personnel
- Secure digital storage systems
- Controlled sharing practices

## Participant Rights

Participants have the right to:

- Access their personal data
- Request correction of inaccurate information
- Request deletion where legally permitted
- Withdraw consent where processing is based on consent
- Object to certain processing where applicable

Requests can be made through CALD program administration.

## International Data Considerations

Where applicable, personal data is handled in a manner consistent with GDPR principles of data minimization, purpose limitation, and protection of individual rights.

## Relationship to Other CALD Policies

This policy governs data processing. The Virtual Learning Privacy, Recording, and Image Use Policy governs session recordings, screenshots, image use, and behavioral restrictions during learning activities.

Both policies operate together to protect participant privacy and psychological safety.



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## Policy Acknowledgment

Enrollment in CALD and submission of personal information, as confirmed through submission of the CALD Registration and Consent Form, constitute acknowledgment of this policy.



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# Coaching to Advance Leader Development

## Intellectual Property Policy

LEADZUS, LLC retains all rights, title, and interest in and to the intellectual property associated with the Coaching to Advance Leader Development (CALD) program.

This includes, but is not limited to:

- Course curriculum and instructional design
- Presentation materials, slides, manuals, handouts, and digital resources
- Coaching frameworks, tools, assessments, and methodologies
- Recorded sessions, demonstrations, and learning assets
- Program branding, names, and proprietary processes

These materials are provided to participants for individual educational use only.

### Permitted Use

Participants may use CALD materials solely for personal learning and professional development. Access to materials does not grant ownership, reproduction rights, distribution rights, or commercial use rights.

### Prohibited Use

Participants may not copy, reproduce, modify, republish, upload, post, transmit, share, distribute, sell, license, or create derivative works from CALD materials, in whole or in part, without prior written authorization from LEADZUS, LLC.

Permission to adapt or use specific coaching tools in a participant's professional practice must be obtained in writing and is granted on a tool-by-tool basis. No blanket permission is implied.

### Ownership

All intellectual property rights in CALD materials remain the sole property of LEADZUS, LLC. No license to resell, sublicense, distribute, or commercially exploit program materials is granted or implied.

### Recording and Educational Use

Program sessions may be recorded by LEADZUS, LLC for instructional continuity, faculty supervision, mentor coaching, quality assurance, and accreditation purposes, consistent with the Virtual Learning, Privacy, Recording, and Image Use Policy.



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Recordings containing identifiable participants will not be used for public marketing or promotional purposes without separate written consent through a media release.

## **Participant Access**

Participants may request access to recordings in which they directly participated, subject to privacy and confidentiality considerations of other participants, and in accordance with the CALD Virtual Learning Privacy, Recording, and Image Use Policy

## **Enforcement**

Unauthorized use, reproduction, or distribution of CALD intellectual property constitutes a violation of this policy and the Code of Conduct and Behavior Standards found in the CALD Participation Policy and may result in enforcement action, including removal from the program without refund and other remedies available under law.

This policy protects the integrity of CALD's educational design while supporting ethical and professional use of coaching tools.



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## Coaching to Advance Leader Development

### Final Performance Evaluation Process

The CALD final performance evaluation is conducted through two recorded coaching sessions completed with approved pro bono clients under real coaching conditions. Each recording is 20 to 60 minutes in length and accompanied by a transcript. All recordings follow program requirements for client approval, contracting, confidentiality, and signed recording consent prior to submission.

The first recording serves as an observed performance evaluation. It is assessed using the same scoring standards and evaluation criteria as the final evaluation; however, it is conducted in a mentor coaching capacity by the participant's Learning Lab Advisor for developmental purposes rather than as an independent performance assessment. This recording is developmental and prepares participants for formal assessment by providing structured written feedback aligned to ACC performance expectations.

The second recording is the summative final performance evaluation. This recording determines whether the participant meets the ACC level performance standard required for successful completion of the CALD Level 1 program.

### Evaluation and Review

The first recording is evaluated by the participant's Learning Lab Advisor. Feedback is debriefed with the participant during an individual mentor coaching session to support learning, calibration to ACC standards, and preparation for summative assessment.

To maintain an ethical and unbiased performance evaluation process, the second summative recording is evaluated by an appropriately credentialed reviewer who is not the participant's Learning Lab Advisor. This separation between developmental feedback and summative evaluation ensures the assessor of record for the final performance evaluation has no prior evaluative authority or instructional bias related to the participant's progress.

To further strengthen ethical practice and assessment integrity, each cohort includes an additional quality assurance step. An appropriately credentialed reviewer who has not served in any faculty or mentor role for that cohort reviews a random sample of final performance submissions to ensure scoring consistency and adherence to ACC evaluation standards.

All assessors use standardized evaluation tools and calibration practices aligned with ACC Minimum Skills Requirements to support scoring consistency across participants and cohorts.



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## Grading Criteria for Final Performance Evaluation

All performance evaluations are graded using the ICF ACC Minimum Skills Requirements as the scoring standard. Assessors evaluate observable evidence of coaching behaviors in alignment with the Key Skills and Behaviors Consistent with ICF Standards defined for each competency, while also identifying Behaviors Inconsistent With ICF Standards when present

### Competency 1 Demonstrates Ethical Practice

Assessment confirms the coach maintains role clarity, aligns with the ICF Code of Ethics, and facilitates client insight without advising, consulting, or therapeutic drift

### Competency 3 Establishes and Maintains Agreements

Assessment verifies the coach co-creates a session agreement, confirms the client's desired outcome, explores its significance, and maintains focus on the agreed agenda throughout the session

### Competency 4 Cultivates Trust and Safety

Assessment looks for acknowledgment of the client's work, expressed respect or support, and encouragement of the client's expression of feelings, perceptions, concerns, or beliefs

### Competency 5 Maintains Presence

Assessment confirms the coach remains observant, responsive, curious, allows space for reflection, and partners with the client rather than directing the conversation

### Competency 6 Listens Actively

Assessment verifies the coach recognizes and explores client feelings, perceptions, challenges, beliefs, and language use, and summarizes or paraphrases to ensure shared understanding

### Competency 7 Evokes Awareness

Assessment examines whether the coach uses clear, open-ended questions, explores client perspectives and beliefs, and supports the client in viewing situations from different perspectives while avoiding leading or agenda-driven questions

### Competency 8 Facilitates Client Growth

Assessment confirms the coach asks about client learning, supports planning of next steps based on learning, and partners with the client to close the session

## Passing Standard

To pass, the recording must consistently demonstrate ACC-level coaching behaviors as defined in the ICF ACC Minimum Skills Requirements and avoid behaviors defined as inconsistent with ICF standards. Written feedback identifies alignment and gaps within each competency area to ensure transparent, competency-based



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## Failure to Pass Final Recording Assessment Policy

If a participant does not meet ACC level performance standards on the final recording assessment, the following process applies:

- The participant will complete a formal debrief with their Learning Lab Advisor to review assessor feedback and identify specific competency based development priorities.
- The participant is expected to continue skill development across all ICF Core Competencies, with focused practice in areas identified as below ACC standard.
- Additional coaching practice is required to demonstrate application of feedback in subsequent coaching sessions.
- A new recording, transcript, and assessment may be submitted no sooner than 30 days following the debrief.
- Failure to resubmit a recording within six months of the debrief may result in ineligibility for program completion.
- Working with a PCC or MCC credentialed coach or mentor coach is strongly recommended prior to resubmission.
- Resubmissions are evaluated using the same scoring standards and independent assessor structure as the original summative evaluation.

## Failure to Pass First Resubmitted Recording Policy

If a participant does not meet ACC level performance standards on the first resubmitted recording, the following process applies:

- The participant will complete a formal debrief with CALD faculty to analyze assessor feedback and define targeted competency development actions.
- Continued development is required across all competencies, with concentrated practice in areas still below ACC standard.
- Demonstrated applied growth through additional coaching sessions is required before another submission.
- A final recording, transcript, and assessment may be submitted no sooner than 60 days following the debrief.
- Failure to resubmit within six months of the debrief may result in ineligibility for course completion.
- The participant is required to work with a PCC or MCC credentialed coach or mentor coach before submitting the final attempt.
- Resubmissions are evaluated using the same scoring standards and independent assessor structure as the original summative evaluation.