

ISMETA Case Report – Revised Draft Template

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The following Approved Training Programs submitted materials that ISMETA's Research & Publications Committee referred to in creating this template: the Trager Foundation, Colleen Wahl of Integrated Movement Studies (IMS), Yasmin Lambat of SomaSensing Somatic Movement Therapist Certification, Dr. Martha Eddy of Dynamic Embodiment, Janet Kaylo of Laban/Bartenieff and Somatic Studies International, and the Institute of Integrated Bodywork and Movement Therapy (IBMT). The committee revised those materials to produce this Case Report Template.

THE MAP

Introduction
Methods & Rationale
Observations from Client & Practitioner
Discussion & Reflection

Introduction

Client Information: The demographic questions are anonymous and optional. They are not required. This information is gathered from the client, if they choose to answer, not from the facilitator's observations.

Demographic Information:

- Client Name (Initials Only):
- Age:
- Geographical location: country and state/province
- Location of your home: rural/urban/suburban
- Gender identity:
- Racial identity:
- Ethnic identity:
- Differing abilities, including neurodiversity:
- Household income:
 - Under \$15,000
 - \$15,000 - \$24,999
 - \$25,000 - \$49,999
 - \$50,000 - \$99,999
 - \$100,000 - \$149,999
 - \$150,000 - \$199,999
 - \$200,000 - \$299,999
 - \$300,000 - \$499,999
 - \$500,000 and above
- Education level:
 - High school graduate
 - Some college, no degree
 - Associate degree
 - Bachelor's degree

- Master's degree
- Professional degree
- Doctoral degree

Inquiry:

- What brings the client to explore somatic movement?
 - A physical challenge?
 - Emotional reasons?
 - Personal growth?
 - Spiritual reasons?
 - Is it work-related or family/relationship-related?
- What do they hope for by the end of your work together (4, 8, or 12 sessions)?

Documentation:

- As a facilitator, you will keep notes about what you witness, as well as the client's narrative reports about their experiences throughout your work together. If any of your notes will be used in a case study that is published outside of the framework of your training program, the client needs to provide "informed consent." ISMETA is creating sample consent and assent forms for ISMETA-Approved Training Programs to use.
- Do you (the facilitator) plan to record your sessions in any way (e.g., audio or video in addition to written notes) so that you can share "evidence" of your work (with the client's permission) in an educational context (peer review or mentoring/supervision), for marketing purposes and/or to develop a case report that may get published?

Optional Further Assessment for Research Purposes:

- If you wish to conduct research that may be shared beyond the context of your training program, you can also use validated self-report measures through which the client can assess their own experience of elements such as pain or "quality of life." Please see the [Research and Publications Learning Pathway](#) in the ISMETA Professional Development Center for free webinars on building the base of evidence for our work, and specifically for [Writing Case Studies](#).

Methods

Contextualize the session.

Describe the type of session (be specific about the exploration you guided):

- Somatic movement approach(es)
- Touch/hands on
- Verbal guidance
- Visual learning aids
- Sensory awareness in stillness and/or in motion
- Movement
- Other

Setting

- in-person
 - clinical office

- private practice space
- home office/studio
- academic classroom or studio
- online

Rationale

Why did you choose these activities? What possible outcomes did you hope for?

Schedule Map

Session 1:

Activities/Experience:

- Describe the learning activities you chose for the client.

Rationale:

- Why did you make the choices you made?

Notes:

- Initial Observations: How is the client's embodiment expressed? Where do you observe areas of restriction or strain? Do you observe any held patterns or any learned movement patterns? Do you observe any places where they move freely? What movements do they seem to prefer and/or find pleasure in?
- Movement Exploration: How did you invite the client into sensory awareness and into movement? And why? When and where did you notice resistance and/or ease? What else happened?
- Client Responses: How did the client respond to the process? Did they experience any shifts or insights, for example about their movement patterns, new possibilities, and potential applications to their daily activities and/or relationships? Did they comment on any aspects of their identity or socio-economic status that impacted their experience of the session? What is the overall takeaway from the session?
- Client's voice: What emerged? What verbal or vocal expression (key words, phrases, or sounds) did they use to express or describe their experience?
- Practitioner's voice: What key words or phrases arose in you as you facilitated the session? What questions did you ask? What feedback did you offer?
- Self-Practice: What practices or resources (articles, videos, books) did you provide to the client to include in their daily life to help them embody the process of self-regulation and self-organization?

Sessions 2-4: (Create a section for each session.)

Activities/Experience:

- Describe the learning activities you chose for the client.

Rationale:

- Why did you make the choices you made?

Notes:

- Emerging Awareness: Compared to your initial observations, where do you notice areas of restriction or strain now? Do you observe changes in their held patterns? Do you observe any new places where they move freely? What movements do they seem to prefer and/or find pleasure in now?

- Movement Exploration: How did you invite the client into sensory awareness and into movement? And why? When and where did you notice resistance and/or ease? What else happened?
- Client Responses: How did the client respond to the process? Did they experience any shifts or insights, for example about their movement patterns, new possibilities, and potential applications to their daily activities and/or relationships? Did they comment on any aspects of their identity or socio-economic status that impacted their experience of the session? What is the overall takeaway from the session?
- Client's voice: What emerged? What verbal or vocal expression (key words, phrases, or sounds) did they use to express or describe their experience?
- Practitioner's voice: What key words or phrases arose in you as you facilitated the session? What questions did you ask? What feedback did you offer?
- What structure type did the client need – Consistent routines or guided practice? More spontaneous, self-organizing explorations? Did your facilitation structure change over the course of multiple sessions?
- Self-Practice: What practices or resources (articles, videos, books) did you provide to the client to include in their daily life to help them embody the process of self-regulation and self-organization?
- Does it seem that the client is using the practices outside of session times? If so, describe what you see or hear that supports evidence of self-practice.

Sessions 5-8 (Create a section for each session.)

Activities/Experience:

- Describe the learning activities you chose for the client.

Rationale:

- Why did you make the choices you made?

Notes:

- Ongoing Awareness: Compared to your previous observations, where do you notice areas of restriction or strain now? Do you observe changes in their held patterns? Do you observe any new places where they move freely? What movements do they seem to prefer and/or find pleasure in now?
- Movement Exploration: How did you invite the client into sensory awareness and into movement? And why? When and where did you notice resistance and/or ease? What else happened?
- How did you build on previous sessions?
- Client Responses: How did the client respond to the process? Did they experience any shifts or insights, for example about their movement patterns, new possibilities, and potential applications to their daily activities and/or relationships? Did they comment on any aspects of their identity or socio-economic status that impacted their experience of the session? What is the overall takeaway from the session?
- Client's voice: What emerged? What verbal or vocal expression (key words, phrases, or sounds) did they use to express or describe their experience?
- Practitioner's voice: What key words or phrases arose in you as you facilitated the session? What questions did you ask? What feedback did you offer?

- What structure type did the client need – Consistent routines or guided practice? More spontaneous, self-organizing explorations? Did your facilitation structure change over the course of multiple sessions?
- Self-Practice: What practices or resources (articles, videos, books) did you provide to the client to include in their daily life to help them embody the process of self-regulation and self-organization?
- Does it seem that the client is using the practices outside of session times? If so, describe what you see or hear that supports evidence of self-practice.

Sessions 9 – 12 (Create a section for each session.)

Activities/Experience:

- Describe the learning activities you chose for the client.

Rationale:

- Why did you make the choices you made?

Notes:

- Ongoing Awareness: Compared to your previous observations, where do you notice areas of restriction or strain now? Do you observe changes in their held patterns? Do you observe any new places where they move freely? What movements do they seem to prefer and/or find pleasure in now?
- Movement Exploration: How did you invite the client into sensory awareness and into movement? And why? When and where did you notice resistance and/or ease? What else happened?
- How did you build on previous sessions?
- Client Responses: How did the client respond to the process? Did they experience any shifts or insights, for example about their movement patterns, new possibilities, and potential applications to their daily activities and/or relationships? Did they comment on any aspects of their identity or socio-economic status that impacted their experience of the session? What is the overall takeaway from the session?
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- What structure type did the client need – Consistent routines or guided practice? More spontaneous, self-organizing explorations? Did this change over the course of multiple sessions?
- Self-Practice: What practices or resources (articles, videos, books) did you provide to the client to include in their daily life to help them embody the process of self-regulation and self-organization?
- Does it seem that the client is using the practices outside of session times? If so, describe what you see or hear that supports evidence of self-practice.

Observations from Client and Practitioner: Summary of Session Notes

- What were your significant observations and experiences as you worked with the client

- What was your understanding of the client's needs and how did they inform your choices to work in specific ways?
- What did you learn about their unique process and how can you apply this knowledge to future observations and explorations?

Discussion and Reflection

Reflect on the observations you and your client made.

- What did the client hope for at the start and how is the client now? (Please see prompts from Session 1 for more detail.)
- Did the process align with the client's expectations?
- What was surprising or unexpected?
- What were the most noticeable themes that emerged during your sessions with this client?
- From your practitioner perspective, what was the most significant change?
- From the client's perspective, what was the most significant change?
- Explain/describe any questions or curiosities that remain.
- Identify next steps or options that you would consider if/when you continue to work with this client.
- Discuss your development and learning of yourself as a therapist and educator.