



Continuing Education Eligibility Checklist

Thank you for considering offering a Continuing Education (CE) eligible proposal/program! The following information has been developed to assist you in developing a proposal and written learning objectives that comply with the requirements pertaining to CE eligibility.

The information contained herein represents the Appendices of the American Psychological Association’s (APA) Continuing Education Sponsor Application (CESA) in addition to requirements from the International Coaching Federation (ICF) and the Society for Human Resource Management (SHRM). It is our hope that by using these documents, your proposed program and learning objectives will more closely conform to APA’s ICF’s, and SHRM’s CE proposal requirements.

You may choose to apply to be eligible for continuing education units granted by SCP and SPIM for APA, ICF and/or SHRM. You do NOT need to apply for all 3 (you also do not need to apply for any of them if you do not wish to do so). Fields in the submission form which do not note an organizational affiliation are based on APA’s requirements, but are likely to be necessary if you choose to apply for ICF or SHRM eligibility.

If you have any questions, please do not hesitate to contact:
 Julia Corcoran, Psy.D. at drjuliacorcoran@gmail.com (SCP CE Co-Chair)
 Bill Battle, Ph.D. at bill@gothamleadership.com (SCP CE Co-Chair)
 Elizabeth Thompson at Ph.D. at thompstone@kennedykrieger.org (SPIM CE Chair)

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Quick View Summary of APA’s CE Eligibility Requirements

Portions of this document were adapted from APA CESA Application with slight modifications to content and examples

Please review this entire document for the detailed information related to this summarized information.

I. CE Eligible programs must satisfy all four of the following:

- 1) Helps psychologists to better serve the public and enhance the profession;
- 2) Is understood as building on a doctoral degree in psychology;
- 3) Is credible (e.g., theoretically; empirically; accepted conventional practice) OR addresses legal, ethical, or regulatory professional standards
- 4) Is relevant to psychological practice, education, and/or science.

Sessions that focus on how consultants can improve themselves, but not how this will serve the public or enhance the profession, are ineligible for CEs.

II. Learning Objectives: CE Eligible programs must include learning objectives that are observable, quantifiable and focused on what attendees will be able to do as a result of attending the session that will ultimately better serve the public and enhance the profession.

III. “Section D” Criteria: All APA CE eligible programs must fit into one of the following three criteria.

Criterion 1.1 Program content focuses on application of psychological assessment and/or intervention methods that have overall consistent and credible empirical support in the contemporary peer reviewed scientific literature beyond those publications and other types of communications devoted primarily to the promotion of the approach.

Criterion 1.2 Program content focuses on ethical, legal, statutory or regulatory policies, guidelines, and standards that impact psychological practice, education, or research.

Criterion 1.3 Program content focuses on topics related to psychological practice, education, or research other than application of psychological assessment and/or intervention methods that are supported by contemporary scholarship grounded in established research procedures.

IV. Current Literature References: All presenters must provide 3 (or more) current (within the last 10 years) empirical or peer-reviewed literature references from the scholarly literature (i.e., generally textbooks are not acceptable) in support of your session’s content or concepts. If included references are authored or co-authored by the session presenter(s), please be sure to note this as a potential conflict of interest later in this application.

Overview of APA’s CE Eligibility Requirements

The proposal/program adheres to **APA’s definition of continuing education in psychology**, which is defined as **an ongoing process consisting of formal learning activities that are (1) relevant to psychological practice, education and science, (2) enable psychologists to keep pace with emerging issues and technologies, and (3) allow psychologists to maintain, develop, and increase competencies in order to improve services to the public and enhance contributions to the profession.**

If the proposal/program addresses the personal or professional well-being and development of the psychologist, be specific about *how* this is addressed. While it is hoped that CE programs will help psychologists achieve their personal and professional goals, programs with this focus must clearly explain how this clearly meets the above definition to be considered for CE eligibility. **In general, sessions focused on the attendee's personal or professional well-being will not be eligible for CEs unless they meet the above definition *and* satisfy a “Standard D” criterion** (described below).

Other key criteria

- ✓ Determination of eligibility is not made on the basis of topic alone.
 - The responsibility is on the applicant to **adequately establish the bridge between program content and the elements of the criteria**. Is this bridge clearly articulated?
- ✓ The proposal/program clearly articulates the “intent” of the program.
 - Specifically, **will the intent help psychologists serve the public and enhance the profession?**
- ✓ The proposal/program is clearly understood as **building on a doctoral degree in psychology**.
- ✓ The proposal/program is **creditable** (e.g., theoretically, empirically; accepted conventional practice) **OR addresses legal, ethical, or regulatory professional standards**. (See “*Standard D*”, below, for detail.)
- ✓ In general, there should be **no more than 3 presenters for a 90-minute presentation and 4 presenters for a 2-hour presentation**.

Learning Outcomes / Objectives

- ✓ Learning objectives, or learning outcomes, (both abbreviated as LOs) are statements that **clearly describe what the learner will know or be able to do as a result of having attended an educational program or activity**.
- ✓ Proposals/programs must have **clearly stated LOs** that are **relevant to psychological practice, theory, and method for doctoral level psychologists**.
- ✓ Recommended **number of LOs**:
 - 3 to 4 LOs for sessions that are 1-4 hours long
 - 4 to 5 LOs for a 5-6 hour session
 - 5 to 6 LOs for a 7-8 hour session
- ✓ LOs should (1) focus on the learner, and (2) contain action verbs that describe measurable behaviors.
- ✓ Clearly identify what **knowledge, skills, and/or abilities** (i.e., **KSAs**) participants can hope to gain upon successful completion of the proposal/program.
- ✓ LOs should be **specific, observable, and measurable**. Quantify all LOs by including numbers where applicable such as: “*Participants will be able to identify **three** coaching skills for maximum client growth and development.*”
- ✓ Precisely describe **what a particular activity/component** of the program is **designed to achieve**.
- ✓ LOs have 3 distinguishing elements:
 1. The specified action by the participants must be **observable**.
 2. The specified action by the participants must be **measurable**.
 3. The specified action must be **done by the participants**.
- ✓ Can the outcome be assessed? If not, the outcome probably does not meet the criteria.
- ✓ LOs contain 3 components. Each learning objective must answer **each** of these questions:
 1. **Who is to perform/carry out** the specified action?
 2. **What action** are they going to take?
 3. **What result** will come from their action?

Writing Behavioral Learning Objectives and Assessments

- ✓ LOs should be written in a quantifiable manner that **allows participants to evaluate whether they achieved that objective on a 1 to 5 Likert scale**.

Examples

Verbs to consider for LOs	Verbs to <i>avoid</i> for LOs
list, describe, recite, write, predict compute, discuss, explain, assess apply, demonstrate, prepare, use, compare analyze, design, select, utilize, rate compile, create, plan, revise, critique	know, understand learn, appreciate become aware of, become familiar with

Example of well-written LOs:

Based on the content of the workshop, I am able to:

1. *Describe at least two theoretical approaches to group facilitation;*
2. *Employ at least two techniques to refocus a facilitated group discussion when it begins to move off task;*
3. *Explain three ways that virtual facilitation differs from in-person facilitation;*
4. *Demonstrate one technique for doing a process check during a webinar;*
5. *State that I had the opportunity to practice at least one facilitation technique during the workshop.*

More examples to illustrate effective LOs

Session title: Succeeding in a Consulting Career

Insufficient LOs:

At the conclusion of this program, participants will be able to:

1. *Identify the advantages in advancing one's career of having an evidence-based consulting practice*
2. *Manage the complexities of scheduling practicum students, interns, supervisees and other helpers*
3. *Negotiate the ins and outs of getting publications and grants*
4. *Discharge consulting obligations while still having time to write*
5. *Increase chances for retention, tenure, and promotion through understanding consulting firm organization policies and the administrative structure*

Acceptable LOs:

At the conclusion of this program, participants will be able to:

1. *Identify three practical applications that benefit clients from employing evidenced based consulting practices*
2. *Identify three relevant ethical codes associated with the supervision of practicum students, interns, and supervisees*
3. *Describe three regulatory and ethical factors from the APA Ethical Principles of Psychologists and Code of Conduct that apply to publication and grant writing with colleagues or students*
4. *Apply three appropriate consulting skills for maximal client growth*
5. *Use an understanding of consulting form/organization policies and the administrative structure to describe how to create three instances of more efficient consulting products and services that will best serve clients*

Note: The insufficient learning objectives identify the advantages to the individual consultant, but fail to link these to improved services and the broader regulatory, ethical or professional issues that might also serve broader constituents within this context. By contrast, the acceptable learning objectives effectively tie the knowledge gains associated with this program to the effective functioning of the students and the clients associated with the consultant's functioning, and highlight the professional and scientific gains that would be expected to accrue as a result.

Further APA Requirements for CE Sessions Relevant to Presenters

- ✓ **APA Rationale:** The **content** of continuing education is **intended to maintain, develop, and increase conceptual and applied competencies that are relevant to psychological practice, education, and science.**
 - As such, all CE programs offered for CE credit for psychologists **must be grounded in an evidence-based approach.** CE programs that are focused on application of psychological assessment and/or intervention methods must include content that is credibly supported by the most current scientific evidence. CE programs may also provide information related to ethical, legal, statutory or regulatory policies, guidelines, and standards that impact psychology.
- ✓ To meet the above rationale, CE Session presenters must identify the Criteria (referred to as “**Standard D**”) into which their proposed session best fits. While not prohibited from selecting more than 1 area, we strongly **encourage presenters to limit themselves to only 1 area of focus.** (See Appendix 4 for additional information regarding Standard D criteria.)
 - ___ Criterion 1.1: Program content focuses on **application of psychological assessment and/or intervention** methods that have overall consistent and credible empirical support in the contemporary peer reviewed scientific literature beyond those publications and other types of communications devoted primarily to the promotion of the approach.
 - ___ Criterion 1.2: Program content focuses on **ethical, legal, statutory or regulatory policies, guidelines, and standards** that impact psychological practice, education, or research.
 - ___ Criterion 1.3: Program content focuses on topics related to **psychological practice, education, or research other than application of psychological assessment and/or intervention** methods that are supported by contemporary scholarship grounded in established research procedures.
 - You must briefly describe **how the program content meets the specified criterion.**
- ✓ Presenters are required to **provide 3 (or more) current (within the last 10 years) literature references** for each proposed session. (See Appendix for additional details about references.)
 - If included references are authored or co-authored by the session presenter(s), please be sure to note this as a *potential conflict of interest* later in this application.
- ✓ Presenters are not required to be psychologists, however, all presenters of CE sessions must be **properly qualified** and have sufficient experience with their given topic area.
 - **Each presenter** is required to **provide a CV/resume** for review by the CE Committee.
- ✓ Presenters must include statements during the CE Session that **describe the accuracy and utility of the materials** presented, the basis of such statements, the **limitations** of the content being taught, and the severe and the most common **risks.**
- ✓ Presenters should **clearly describe any commercial support** for the CE program, presentation, or instructor to program participants at the time the CE program begins.
 - Any other relationships that could be reasonably construed as a conflict of interest also must be disclosed at the time the CE program begins. SCP and SPIM are also required to identify the presence or absence of any potential conflicts of interest or commercial support in the programming and advertising material for each CE session so that potential participants are made aware of this prior to attending the session, in addition to being informed by the presenter at the start of the session.
- ✓ In order to ensure adherence to APA's requirements for CE eligibility, questions concerning much of the above will be included in attendees' post-session evaluations (e.g., whether or not the presenter disclosed any possible conflicts of interest at the beginning of their sessions). This feedback will be used when reviewing future proposals for CE eligibility.

Overview of ICF's CCE Eligibility Requirements

The majority of ICF's CCE eligibility requirements are the same as APA's, and thus do not require additional information. This section details the information which ICF requires *in addition to* APA.

Presenter Qualifications

- ✓ Coaching credentials are **not** required in order to be eligible for ICF CCE units, however, we do need to report each presenters' educational background, and coaching and other relevant credentials to ICF.

Competencies

- ✓ Of the [ICF Core Competencies](#), a CCE-eligible session should **discuss at least 2**: (*see Appendix for details*)

Cluster	Core Competencies
Setting the Foundation	Meeting Ethical Guidelines and Professional Standards
	Establishing the Coaching Agreement
Co-creating the Relationship	Establishing Trust and Intimacy with the Client
	Coaching Presence
Communicating Effectively	Active Listening
	Powerful Questioning
	Direct Communication
Facilitating Learning and Results	Creating Awareness
	Designing Actions
	Planning and Goal Setting
	Managing Progress and Accountability

- ✓ CCE sessions should have a target audience. Which coaching specialties are present within this program?
 - Business/Organizations
 - Career/Transitions
 - Coaching other coaches
 - Executive coaching

Program materials

- ✓ If you will be providing **handouts or other materials** to participants, please include a description of those here, and upload copies of what you will hand out.

Overview of SHRM's PDC Eligibility Requirements

The majority of SHRM's PDC eligibility requirements are the same as APA's, and thus do not require additional information. This section details the information which SHRM requires *in addition to* APA.

Presenter Qualifications

- ✓ You do not need to be a member of SHRM to host or present a PDC-eligible session, however, you must be sufficiently qualified to present on your given topic area and to create a session that meet SHRM's PDC requirements. We will use your CV to establish relevant qualifications.

Competencies

- ✓ Each program must describe both learning objectives (described earlier in this document) and the competencies/knowledge areas to be taught, with specific references to the [SHRM Body of Competency and Knowledge](#) (BoCK). For more information, follow that link or see the Appendix.
 - Please include a brief summary of which BoCKs you will cover, and how. If you wish, you may opt to write your Learning Objectives to specifically denote the applicable BoCKs.

SHRM’s Behavioral Competencies		SHRM’s Technical Competency and HR Functional Areas	
Cluster	Competency	Domain	Functional Area
Leadership	Leadership & Navigation	People	HR Strategic Planning
	Ethical Practice		Talent Acquisition
Interpersonal	Relationship Management		Employee Engagement & Retention
	Communication		Learning & Development
	Global & Cultural Effectiveness		Total Rewards
Business	Business Acumen		Organization
	Consultation	Organizational Effectiveness & Development	
	Critical Evaluation	Workforce Management	
		Employee & Labor Relations	
		Technology Management	
		Workplace	
			Diversity & Inclusions
			Risk Management
			Corporate Social Responsibility
			US Employment Laws & Regulations

APPENDIX

APA STANDARD D: Expanded Definitions and Detail for Criterion 1.1 to 1.3.

Criterion D 1 needs to be satisfied in one or more of the following three ways. Although any given program may utilize two or more of these criteria, only one is required. Programs are not advantaged by selecting more than one of the three criteria to satisfy Criterion D 1. All three criteria (1.1, 1.2, and 1.3) are designed to satisfy Criterion D 1 in qualitatively different ways.

Criterion 1.1 reflects program content that has been subjected to mechanisms of external professional peer review. This content can extend beyond empirical research (cf. Criterion 1.3) and may include theoretical,

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conceptual, case studies or secondary research reviews. Criterion 1.1 emphasizes the acceptability of program content based on peer review in journals, professional conferences, or venues of independent review that support the relevance and acceptability of program content for the discipline of psychology. As an example, a program focused on a new theoretical development concerning borderline personality disorder might use Criterion 1.1 to satisfy Criterion D 1 by citing peer reviewed publications (not necessarily empirical) or presentations that support this program content.

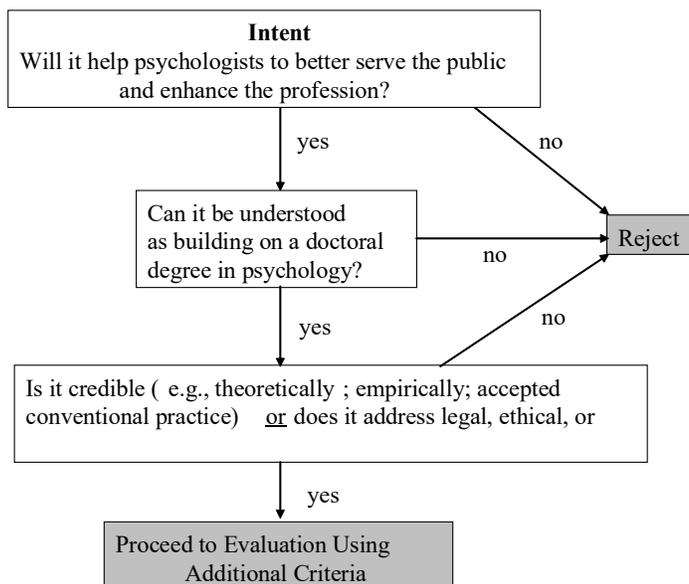
Criterion 1.2 reflects program content that pertains to ethical, professional or regulatory developments relevant to the discipline of psychology. As an example, Criterion 1.2 might be used to satisfy Criterion D 1 in relation to a program that emphasizes the personal or legal risks and risk management associated with working with individuals with borderline personality disorders.

Criterion 1.3 reflects program content that has been subjected to accepted research practices within psychology and has satisfied broader scientific scrutiny within the field. The emphasis of Criterion 1.3 is placed on the application of sound methodological practices and the availability of scientific support for the program content. As an example, a program focused on a new instrument for assessing, or a new intervention for treating, borderline personality disorder might use Criterion 1.3 to satisfy Criterion D 1 by clearly describing empirical work or citing published research that supports the validity of the program content.

APA STANDARD D: Criteria and Processes for Determining Program CE-Eligibility

Acceptable programs must adhere to the definition of continuing education in that they improve service to the public and enhance contributions to the profession. Programs that address the personal or professional well-being of the psychologist must also demonstrate how they meet the above definition. Determination of eligibility is not made on the basis of topic alone. The responsibility is on the applicant to adequately establish the bridge between program content and the elements of the criteria. The more distant a topic appears from core disciplinary knowledge, the greater the responsibility of the sponsor to demonstrate the connection to improvement of services to the public and contributions to the profession.

The CE Committee will use the *Standards and Criteria for Approval of Sponsors of Continuing Education for Psychologists* to evaluate proposals. In so doing, they will employ the following evaluative steps:



Illustrative example: *Building Your Practice*

Insufficient learning objectives	Acceptable learning objectives
<i>Compare advantages and disadvantages of buying versus renting office space</i>	<i>Identify the professional, legal and ethical issues related to buying versus renting office space</i>
<i>Learn to read a financial report</i>	<i>List three regulatory issues concerning electronic medical records and billing systems</i>
<i>Maximize income from managed care</i>	<i>Negotiate contracts for managed care services which maximize patient care</i>
<i>Develop successful strategies for locating sublettors for office space</i>	<i>Analyze and minimize confidentiality concerns involving shared office space</i>
<i>Maximize case load through successful marketing</i>	<i>Create ethically sound marketing tools and techniques</i>
<i>Design promotions to attract the self-pay clientele</i>	<i>Provide effective client advocacy to third party payers</i>

Note: Insufficient learning objectives successfully articulate the advantages that might accrue to the practitioner, but do not extend these to underscore their value to the clients or the broader society that may follow from the knowledge gains associated with this program. Acceptable learning objectives, by comparison, clearly identify the broader contributions that might support the welfare of the consumer and the society by addressing ethical and regulatory implications associated with successful business practice.

APA STANDARD D: Sample Response to D.1 – Course Content Requiring Citations**D.1.1. Program content focuses on application of psychological assessment and/or intervention methods that have overall consistent and credible empirical support in the contemporary peer reviewed scientific literature beyond those publications and other communications devoted primarily to promotion of the approach.**

This criterion cannot be met by referencing books, chapters, monographs, or web-publications that are not demonstrably peer-reviewed. Reliance on non-mainstream journals of limited circulation must be supported by evidence that standard blind-review procedures are followed (i.e., in which the identity of peer reviewers is not known to the study authors, and identity of the study authors is not known to the peer reviewers).

There must be a clear linkage between the research cited and the program content. For example, simply listing a journal article on a broad or related issue is unacceptable until and unless the applicant specifically documents how the referenced research is relevant to the specific program content. It is not acceptable to assert that the program content has been included in peer-reviewed publications without providing specific references that are currently available to reviewers and support that assertion.

Providing an abstract that shows the relevant linkage or quoting from the conclusions section may be helpful in some circumstances, but doing so will rarely be sufficient without further explanation in the narrative provided for the relevant program.

It will rarely be necessary to provide full copies of journal articles or book chapters unless the reference is obscure or otherwise difficult to obtain (such as a government technical report).

If included references are authored or co-authored by the session presenter(s), please be sure to note this as a potential conflict of interest later in this application.

Applicants are strongly encouraged to clearly construct an intellectual bridge in their narrative between the content of the program and the references used to provide evidence in support of it.

Examples of appropriate references:

American Psychological Association, Task Force on Evidence-Based Practice with Children and Adolescents. (2008). Disseminating evidence-based practice for children and adolescents: A systems approach to enhancing care. Retrieved from <http://www.apa.org/pi/cyf/evidence.html>.

Smith, J.G., Robertson, L.M., & Jones, K.V. (2011). Examining the neuropsychosocial correlates of conduct disturbance in urban adolescents. National Institute of Health (Funded at \$100,000).

U.S. Department of Health and Human Services, National Institutes of Health, National Heart, Lung, and Blood Institute. (2003). Your guide to lowering blood pressure. (NIH Publication No. 03-5232). Retrieved from http://www.nhlbi.nih.gov/health/public/heart/hbp/hbp_low/hbp_low.pdf

D.1.2. Program content focuses on ethical, legal, statutory or regulatory policies, guidelines, and standards that impact psychological practice, education, or research

In order to meet this criterion, the program content must be primarily focused on the topics listed. It is not sufficient to respond that the program fulfills this requirement simply because a mention of concern for ethical practice will be included in the presentation.

The general expectation is that programs meeting this criterion will include specific content, as evidenced by learning objectives, addressing ethical issues particularly relevant to the topic under consideration or entirely devoted to ethical, legal, statutory, or regulatory concerns.

At least three of the references must be explicitly linked to the program content. References that provide an overview of the entire APA ethics code (e.g., Knapp, 2011) cannot be used as the only references providing evidence for criterion D.1.2.

As an example, a program focusing on providing training regarding ethical issues involved in working with religious/spiritual issues in psychotherapy could be supported by references to works by the American Psychological Association (2007), chapter 10 of Frame (2003), Hathaway (2011), Knapp, Lemoncelli, and Vandecreek (2010), chapter 7 of Richards and Bergin (2005), and Tjeltveit (2011).

Examples of appropriate references:

American Psychological Association Council of Representatives. (2007). Resolution on religious, religion-based and/or religion-derived prejudice. Washington, DC: Author.

Frame, M. W. (2003). Integrating religion and spirituality into counseling: A comprehensive approach. Pacific Grove, CA: Brooks/Cole.

Hathaway, W. L. (2011). Ethical guidelines for using spiritually oriented interventions. In J. D. Aten, M. R. McMinn, & E. L. Worthington, Jr. (Eds.), Spiritually oriented interventions for counseling and psychotherapy (pp. 65-81). Washington, DC: American Psychological Association.

Knapp, S. J. (Ed.). (2011). APA handbook of ethics in psychology (Vols. 1-2). Washington, DC: American Psychological Association.

Knapp, S., Lemoncelli, J., & Vandecreek, L. (2010). Ethical responses when patients' religious beliefs appear to harm their well-being. Professional Psychology: Research and Practice, 41, 405-412. Richards, P. S., & Bergin, A. E. (2005). A spiritual strategy for counseling and psychotherapy (2nd ed.). Washington, DC: American Psychological Association.

Tjeltveit, A. C. (2011). Religion, spirituality, and mental health. In S. J. Knapp (Ed.-in-Chief), M. C. Gottlieb, & L. D. Vandecreek (Assoc. Eds.), APA handbooks in psychology: APA handbook of ethics in psychology (Vol. 1, pp. 279-294). Washington, DC: American Psychological Association.

D.1.3. Program content focuses on topics related to psychological practice, education, or research other than application of psychological assessment and/or intervention methods that are supported by contemporary scholarship grounded in established research procedures

Sufficient evidence to meet this standard may require substantial accumulation of information. In some cases, the evidence relevant to this criterion will overlap that relevant for D.1.1. If applicants seek to show that the content has been supported using established research procedures and scientific scrutiny, applicants must provide specifics of the research, how it was conducted, by whom, under what controls, and with what level of review.

For purposes of responding to this criterion, “established procedures” include, among others, linking the research to the relevant nomological and theoretical network and development of testable hypotheses, appropriate research design, review by an IRB, use of appropriate and established scientific methods, and careful and full reporting of methods and results.

Examples of appropriate references:

Barlow, D. H. (2008). Clinical handbook of psychological disorders: A step-by-step treatment manual (4th ed.). New York, NY: Guilford.

Butler, A. C., Chapman, J. E., Forman, E. M., & Beck, A. T. (2006). The empirical status of cognitive-behavioral therapy: A review of meta-analyses. Clinical Psychology Review, 26, 17-31.

Fisher, J. E., & O’Donohue, W. T. (2006). Practitioner’s guide to evidence-based psychotherapy. New York, NY: Springer.
Mitte K. (2005). Meta-analysis of cognitive-behavioral treatments for generalized anxiety disorder: A comparison with pharmacotherapy. Psychological Bulletin, 131, 785-795.

ICF Core Competencies Overview

There is a detailed set of examples for each Core Competency and a comparison table to understand the certification-levels at which each Competency can be taught. [Please review that in full before making your selection.](#)

Definitions of each Core Competency

A. Setting the Foundation

1. Meeting Ethical Guidelines and Professional Standards—Understanding of coaching ethics and standards and ability to apply them appropriately in all coaching situations.

2. Establishing the Coaching Agreement—Ability to understand what is required in the specific coaching interaction and to come to agreement with the prospective and new client about the coaching process and relationship.

B. Co-Creating the Relationship

3. Establishing Trust and Intimacy with the Client—Ability to create a safe, supportive environment that produces ongoing mutual respect and trust.

4. Coaching Presence—Ability to be fully conscious and create spontaneous relationship with the client, employing a style that is open, flexible and confident.

C. Communicating Effectively

5. Active Listening—Ability to focus completely on what the client is saying and is not saying, to understand the meaning of what is said in the context of the client’s desires, and to support client self-expression.

6. Powerful Questioning—Ability to ask questions that reveal the information needed for maximum benefit to the coaching relationship and the client.

7. Direct Communication—Ability to communicate effectively during coaching sessions, and to use language that has the greatest positive impact on the client.

D. Facilitating Learning and Results

8. Creating Awareness—Ability to integrate and accurately evaluate multiple sources of information and to make interpretations that help the client to gain awareness and thereby achieve agreed-upon results.

9. Designing Actions—Ability to create with the client opportunities for ongoing learning, during coaching and in work/life situations, and for taking new actions that will most effectively lead to agreed-upon coaching results.

10. Planning and Goal Setting—Ability to develop and maintain an effective coaching plan with the client.

11. Managing Progress and Accountability—Ability to hold attention on what is important for the client, and to leave responsibility with the client to take action.

SHRM BoCK Overview

Behavioral Competencies - Definitions

Cluster	Competency	Definition
Leadership	Leadership & Navigation	The knowledge, skills, abilities, and other characteristics (KSAOs) needed to navigate the organization and accomplish HR goals, to create a compelling vision and mission for HR that aligns with the strategic direction and culture of the organization, to lead and promote organizational change, to manage the implementation and execution of HR initiatives, and to promote the role of HR as a key business partner.
	Ethical Practice	The KSAOs needed to maintain high levels of personal and professional integrity, and to act as an ethical agent who promotes core values, integrity and accountability throughout the organization.
Interpersonal	Relationship Management	The KSAOs needed to create and maintain a network of professional contacts within and outside of the organization, to build and maintain relationships, to work as an effective member of a team, and to manage conflict while supporting the organization.
	Communication	The KSAOs needed to effectively craft and deliver concise and informative communications, to listen to and address the concerns of others, and to transfer and translate information from one level or unit of the organization to another.
	Global & Cultural Effectiveness	The KSAOs needed to value and consider the perspectives and backgrounds of all parties, to interact with others in a global context, and to promote a diverse and inclusive workplace.
Business	Business Acumen	The KSAOs needed to understand the organization's operations, functions and external environment, and to apply business tools and analyses that inform HR initiatives and operations consistent with the overall strategic direction of the organization.

Cluster	Competency	Definition
	Consultation	The KSAOs needed to work with organizational stakeholders in evaluating business challenges and identifying opportunities for the design, implementation and evaluation of change initiatives, and to build ongoing support for HR solutions that meet the changing needs of customers and the business.
	Critical Evaluation	The KSAOs needed to collect and analyze qualitative and quantitative data, and to interpret and promote findings that evaluate HR initiatives and inform business decisions and recommendations.

Technical Competency and HR Functional Areas – Definitions

Domain	Functional Area	Definition
People	HR Strategic Planning	Involves the activities necessary for developing, implementing and managing the strategic direction required to achieve organizational success and to create value for stakeholders
	Talent Acquisition	Encompasses the activities involved in building and maintaining a workforce that meets the needs of the organization.
	Employee Engagement & Retention	Refers to the activities aimed at retaining high-performing talent, solidifying and improving the relationship between employees and the organization, creating a thriving and energized workforce, and developing effective strategies to address appropriate performance expectations from employees at all levels.
	Learning & Development	The activities that enhance the knowledge, skills, abilities and other characteristics (KSAOs) and competencies of the workforce in order to meet the organization's business needs.
	Total Rewards	Refers to the design and implementation of compensation systems and benefit packages, which employers use to attract and retain employees.
Organization	Structure of the HR Function	Encompasses the people, processes, theories and activities involved in the delivery of HR-related services that create and drive organizational effectiveness.
	Organizational Effectiveness & Development	Concerns the overall structure and functionality of the organization, and involves measurement of long- and short-term effectiveness and growth of people and processes, and implementation of necessary organizational change initiatives.
	Workforce Management	Refers to HR practices and initiatives that allow the organization to meet its talent needs (e.g., workforce planning, succession planning) and to close critical gaps in competencies.
	Employee & Labor Relations	Refers to any dealings between the organization and its employees regarding the terms and conditions of employment.

Domain	Functional Area	Definition
	Technology Management	Involves the use of existing, new and emerging technologies to support the HR function, and the development and implementation of policies and procedures governing the use of technologies in the workplace.
Workplace	HR in the Global Context	Focuses on the role of the HR professional in managing global workforces to achieve organizational objectives.
	Diversity & Inclusions	Encompasses activities that create opportunities for the organization to leverage the unique backgrounds and characteristics of all employees to contribute to its success.
	Risk Management	The identification, assessment and prioritization of risks, and the application of resources to minimize, monitor and control the probability and impact of those risks accordingly.
	Corporate Social Responsibility	Represents the organization's commitment to operate in an ethical and sustainable manner by engaging in activities that promote and support philanthropy, transparency, sustainability and ethically sound governance practices.
	US Employment Laws & Regulations	Refers to the knowledge and application of all relevant laws and regulations in the United States relating to employment—provisions that set the parameters and limitations for each HR functional area and for organizations overall.