

**GUIDELINES FOR EDUCATION AND TRAINING
AT THE DOCTORAL AND POSTDOCTORAL LEVEL
IN CONSULTING PSYCHOLOGY (CP) /ORGANIZATIONAL CONSULTING
PSYCHOLOGY (OCP)**

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Prepared for the

Society for Consulting Psychology (SCP)

Division 13 of the American Psychological Association (APA13)

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Section A. Introduction

This document represents a revision to the Guidelines approved in 2005 and authored by Ann M. O’Roark, PhD, Paul J. Lloyd, PhD, and Stewart Cooper, PhD. Members of the original Division 13 Guidelines Development Committee, 1997–2001, were Rodney L. Lowman, PhD, Clayton Alderfer, PhD, Michael Atella, PhD, Stewart Cooper, PhD, Andrew Garman, PhD, David Hellkamp, PhD, Richard Kilburg, PhD, Paul Lloyd, PhD, and Ann M. O’Roark, PhD. The Education and Training Committee Chair (1994–1997) of the Preparations for Development was DeWayne Kurpius, PhD.

Members of the Education and Training Guidelines Revision Committee who have updated the guidelines include: Elizabeth C.D. Gullette, PhD (E&T Guidelines Revision Committee Chair, 2012-2016), John Fennig, PhD (SCP President, 2015), Tom Reynolds, PsyD, Carolyn Humphrey, PhD (SCP Secretary, 2014-2017 and Education Domain Leader, 2010-2013), and Melanie Kinser, PhD (SCP Education Domain Leader, 2014-2017).

The purpose of these revised “Guidelines for Education and Training at the Doctoral and Postdoctoral Levels in Consulting Psychology/Organizational Consulting Psychology,” which update and replace the guidelines originally approved in 2005 and published in 2007 (APA, 2007), is to provide a common framework for use in the development, evaluation, and review of education and training in consulting psychology/organizational consulting psychology (CP/OCP). The intent of these guidelines is to improve the quality of teaching and learning in the area of the practice of CP, especially OCP, within the scientific discipline and profession of psychology. Towards these ends, this document is intended as guidance for psychologists who

teach or plan curricula for teaching CP/OCP at doctoral or postdoctoral levels of professional education and training in psychology.

These guidelines will be updated within ten years of the date initially approved by the American Psychological Association (APA) in accordance with provisions of Association Rule 30-8.3 and in alignment with the governance coordinating responsibilities and review managed by the Board of Educational Affairs (BEA) (2004, *Developing and Evaluating Standards and Guidelines Related to Education and Training in Psychology: Context, Procedures, Criteria, and Format*).

A.1. Terminology

A.1.(a). Use of terms standards and guidelines

Guidelines are defined as pronouncements, statements, or declarations that suggest or recommend specific professional behavior, endeavors, or conduct for psychologists (American Psychological Association, 1992). The guidelines set forth in this document are consistent in intent and content with this definition, serving as a framework for guiding principles and suggested learning goals referred to as competencies. The guidelines set forth in this document are voluntary, not mandatory; they are aspirational teaching and learning objectives, not required standards. As such, they are intended to afford broad latitude for curriculum and continuing education program development in the emerging field of CP/OCP practice.

A.1.(b). Rationale for use of term(s)

Guidelines is the appropriate term of choice for aspirational recommendations in regard to curriculum development, learning objectives, and teaching strategies to those responsible for graduate and postdoctoral education and training in psychology. Although ultimate responsibility for matters of curriculum development and pedagogy is that of the faculty in higher education

institutions and programs, the involvement of national regulatory and disciplinary associations in developing and promulgating guidelines related to professional development is recognized, especially for new or changing areas of practice. CP/OCP is such an area in the practice of psychology.

A.2. Scope of Application and need for proposed guidelines

A.2.(a). Scope of application

Although there are other applications of CP for which alternative or additional competencies may be relevant (e.g., health-related CP), the guidelines for education and training in this document relate to CP as it is applied to OCP. They are intended for use as suggestions or recommendations for psychology faculty responsible for teaching or planning curricula at doctoral or postdoctoral education and training levels in professional psychology. In that vein, however, they are not intended to take precedence over the judgment of faculty or others of academic authority responsible for specific education and training programs. Nor are these guidelines intended to replace, usurp, or conflict with training policies or guidelines that have been developed and approved for other areas of practice in psychology. Moreover, these guidelines are not meant to serve as guidelines for accreditation.

A.2.(b). Need for proposed guidelines

As stated in the original guidelines proposal, the premise on which the need for these guidelines is based is stated as follows: *Being an effective psychologist is not enough to be an effective consultant. There is a body of knowledge and skills unique to this particular application of psychology, and just graduating from a doctoral program in psychology does not [necessarily] prepare one to provide consultees with the best possible consulting services* (Robinson-Kurpius, Fuqua, Gibson, Kurpius, & Froehle, 1995, p.88).

This distinction and need was recognized in the earliest years of APA when the 1915 Whipple Resolution task group set up the Committee of Five to differentiate professionally qualified psychological experts from commercial consultants without scientific psychological knowledge or experience who were offering services and opinions for public consumption. SCP/APA Division 13 traces its roots to this Committee of Five and the work of that committee and its successors in defining consulting psychology (Rigby, 1996). Despite this long history, and a rapidly expanding body of CP knowledge and skill base literature (O’Roark, 1999), CP and OCP are underrepresented in doctoral and postdoctoral education and training programs (Blanton, 2014; Hellkamp, Zins, Ferguson, & Hodge, 1998; Garman, Zlatoper, & Whiston, 1998). Moreover, consulting is important to the effectiveness of many if not all practicing psychologists to greater-or-lesser degrees, many of whom may not yet be aware that organizational consulting psychologists typically do more assessments for determining appropriate interventions (action research / calibration consultation to understand client culture and climate) than they do interventions. The continued growth in consulting psychology, especially organizational consulting psychology, heightened the awareness within the division of a need to consolidate and disseminate education and training guidelines for CP useful for doctoral, postdoctoral, and continuing education (CE) programs in professional psychology (Hellkamp & Garmon, 1998; 151 O’Roark, 1999).

While there are doctoral and postdoctoral education and training courses on consultation in a few universities (Blanton, 2014; Hellkamp, Zins, Ferguson, & Hodge, 1998; Munz, 1977)), there exist no other guidelines that address the three-domain competency model considered central in CP/OCP guidelines. The domain infrastructure for OCP addresses competencies focused on individual, group, and organizational/systems (I-G-O) levels. The uniqueness of this

feature of the OCP guidelines was validated when SCP invited four closely aligned divisions to write articles providing comparative analysis, critiques, and feedback on the OCP guidelines for publication in a special issue of the Consulting Psychology Journal: Practice and Research (Cooper, 2002). These articles were invited by the journal's guest editor following completion of the formal call for comment on an earlier draft of the original guidelines, issued by BEA to APA governance groups, divisions, legal counsel, and other interested/affected parties. Since that time, this has become a common way of organizing the competencies required for consulting psychology (e.g., Lowman, 2016).

In summary, OCP guidelines were developed in response to perceived need based on three types of evidence: an increase of interest among psychologists in CP/OCP without a corresponding growth in education and training programs focused on that area of practice; an increase of literature in recent years distinctive to the practice of CP and, especially, OCP that needed to be synthesized; and, a growing consensus of professional support for the three-domain competency model for preparation to practice CP/OCP. It is anticipated that consulting competencies relevant, for example, for a mental health or school psychologist will include knowledge and skills pertinent to each I-G-O domain, but will not include all competencies named for OCP practitioners.

A.3. Process of developing proposed guidelines

The Society of Consulting Psychology (SCP) is responsible for developing these guidelines. Prompted by the increased interest in CP/OCP practice, SCP in 1997 called together an Education and Training (E&T) ad hoc work group of selected division members with recognized experience and expertise backgrounds to undertake the task of developing and writing guidelines for education and training at the doctoral and postdoctoral level in consulting

psychology/ organizational consulting psychology (CP/OCP). Towards that end, the original guidelines document was the result of iterative drafts [1999 – 2004] that had been periodically distributed for comment and feedback from SCP members, APA divisions and governance groups, and non-APA colleagues. The participants in that process and details of the process were detailed in the 2005 Guidelines.

This revision was undertaken, in accordance with guidance from the APA (2004a) in relation to Association Rule 30-8.3, to ensure currency of guidelines related to both their scholarly basis and their practical use. The current revision represents an update to the original guidelines that subsumes the substantive work done in that in-depth process and adds structural clarity, updated evidence and literature citations, and integration of recent developments in society that impact consulting psychology (e.g., use of technology, globalization, heightened awareness of identity group issues).

A.3.(a). Participants and processes in developing guidelines

The original 2005 CP/OCP Guidelines were the result of the substantive contributions of eight Education and Training (E&T) Committee members, including: Rodney L. Lowman (E&T Chair, 1998-2000), Clayton Alderfer, Michael Atella, Andrew Garman, David Hellkamp, Richard Kilburg, Paul Lloyd, Ann O'Roark, and Stewart Cooper (E&T Chair, 2000-2004). They represented different aspects of CP/OCP practice, a nation-wide distribution, and individuals recognized as having expertise and experience in substantive content components. The extensive process used to inform the original guidelines was detailed in that document (see E.1).

Members of the Education and Training Guidelines Revision Committee who have updated the guidelines include: Elizabeth C.D. Gullette (E&T Guidelines Revision Committee Chair, 2012-2016), John Fennig (SCP President, 2015), Tom Reynolds, Carolyn Humphrey (SCP

Secretary, 2014-2017 and Education Domain Leader, 2010-2013), and Melanie Kinser (SCP Education Domain Leader, 2014-2017).

The procedure for gathering input on needed revisions to these guidelines, which took place in 2015, included interviewing thought leaders in the field of consulting psychology from the following groups: authors of the 2007 guidelines, members of the Society of Consulting Psychology (SCP)/Division 13 Guidelines Development Committee, and the co-chairs of another competency-related project in SCP specific to coaching; as well as surveying members of SCP. The goal of both methods was to collect feedback on the strengths, weaknesses, and gaps that should be addressed in a revision of the 2007 guidelines. In addition, the revision committee reviewed other published guidelines that relate to other areas of psychology and to specific issues or competencies covered in this document to evaluate suitability to be referenced for a more in-depth treatment of a given issue.

The general consensus that emerged from this process was that the guidelines were largely solid and a revision should not aim to make substantial substantive changes but rather to update language and information, address contemporary issues that impact consulting work (such as increased diversity along multiple dimensions as well as the hypergrowth of technology and its permeation of all aspects of work), leverage other relevant guidelines and bodies of work that could add value to the discussion herein, enhance the section on organization-level competencies, tighten up the organization of the document, and provide a reading list of OCP resources to support the professional development of consulting psychologists. These changes are addressed in the document that follows (see Appendix A for an Organizational Consulting Psychology Bibliography).

Other issues raised, though not by a majority, included supervision, licensure, master's education and training, and adding a fourth "level" to the OCP competency framework that would address large system change beyond organizations (e.g., communities, industries, transnational systems). The importance of supervised experience is more explicitly emphasized in this revision, particularly in the section on what are now organized as the personal and procedural general competencies, but for a fuller discussion of best practices in supervision in OCP, see Blanton (2014), which also touches on the current status of the licensure discussion. Licensure is addressed as well in Appendix B of this document, *Ways to Learn About and Develop Skills in Consulting Psychology*. Regarding the issue of master's-level training, it was agreed that a common set of competencies to guide curriculum development is adequate at this point and does not preclude other curricular differences appropriate to the goals of the two different degrees. This is in keeping with the most recent guidelines published by the Society for Industrial and Organizational Psychology (SIOP), which conclude that "distinctions between master's-level and doctoral-level training might lead to substantial differences in the two levels of training. However, none...suggests that the basic content of the field changes as a function of the level of education. Thus, only one set of competencies is provided within these guidelines." (SIOP, 2016, p. 2). Addressing a fourth level for consulting psychology was determined to be important enough an issue not to be attempted within the scope of this current revision. From this process, a draft was produced that the SCP Executive Board reviewed and final edits were then incorporated into this final document, which then received final SCP Executive Board approval.

A.3.(b). Policy documents relevant to proposed guidelines

The following documents provided foundations, baseline, and substantive information for preparing the original SCP/OCP guidelines and remain germane to the updated document for the reasons originally cited: Association Rules of the American Psychological Association (APA, 2004b); Developing and Evaluating Standards and Guidelines Related to Education and Training in Psychology: Context, Procedures, Criteria, and Format (APA, 2004a); American Psychological Association ASME Guidelines, (APA, 1992); Ethical Principles of Psychologists and Code of Conduct (APA, 2002); Guidelines On Multicultural Education, Training, Research, Practice, and Organizational Change For Psychologists (APA, 2003); Guidelines for Psychotherapy with Lesbian, Gay, and Bisexual Clients (2000); Guidelines for Education and Training at the Doctoral Level in Industrial/Organizational Psychology (SIOP, 1998), which have since been updated as referenced in this revision (SIOP, 2016); and, Principles for the Validation and Use of Personnel Selection Procedures, 4th Edition (SIOP, 2003).

The original guidelines also relied on the 1999 Bylaws of the Society of Consulting Psychology (SCP) for the definition of consulting psychology (www.div13.org/bylaws.aspx) and, for the general definition of psychological practice, the APA “Model Act for State Licensure of Psychologists,” which has since been updated (APA, 2011) and the Association of State and Provincial Psychology Boards (ASPPB) “Model Act for Licensure of Psychologists,” also recently updated (ASPPB, 2010).

Additional information was provided for the revised guidelines by the Guidelines for the Practice of Telepsychology (APA, 2013), in response to the rise of technology and its demands on psychological practice, including consulting psychology. And, finally, given ongoing demographic and socio-political shifts that will continue to require evolution in the field of

psychology, these revised guidelines refer to the *Guidelines for Psychological Practice with Lesbian, Gay, and Bisexual Clients* (APA, 2012), and the *Resolution on Gender and Sexual Orientation Diversity in Children and Adolescents in Schools* (APA and National Association of School Psychologists [NASP]; 2015).

Section B: Implementation and Maintenance of Proposed Guidelines

Implementation and maintenance of the proposed guidelines is assigned to the Education and Training (E&T) Committee of the Society of Consulting Psychology (SCP)/APA Division 13.

B.1. Plan for promulgating proposed guidelines

Once approved, the SCP E&T Committee will post an updated announcement about the revised guidelines on the Division 13 website, and will publish an announcement in the Division 13 newsletter and journal. In addition, it will provide electronic dissemination of the guidelines to graduate departments and professional schools of psychology, the Council of Chairs of Training Councils, state psychological associations, and APA divisions for possible use in graduate or postdoctoral programs, conferences and workshops, distance learning CE events, and other appropriate education and training events.

B.2. Plan for maintaining currency of guidelines

The SCP E&T Committee will plan for the review and update the proposed guidelines on a regular basis. No later than five years after APA approval of the proposed guidelines, the SCP E&T chair will present a schedule for updating, including recommendations for an ad hoc review committee, a time-table for presenting an updated draft to the SCP Board for review, to the division APA Council Representative, and to the APA Board of Educational Affairs for APA

governance reviews prior to APA Council re-endorsement in time for the update required by Association Rule 80.3.

Section C: Content of Proposed Guidelines

The substance of the guidelines follows.

Guidelines for Education and Training at the Doctoral and Postdoctoral Level in Consulting Psychology (CP)/Organizational Consulting Psychology (OCP)

Purpose of the Guidelines

The purpose of these revised “Guidelines for Education and Training at the Doctoral and Postdoctoral Levels in Consulting Psychology/Organizational Consulting Psychology,” which update and replace the guidelines originally approved in 2005 and published in the *American Psychologist* in 2007 (APA, 2007), is to provide a common framework for use in the development, evaluation, and review of education and training in consulting psychology/organizational consulting psychology (CP/OCP). The intent of these guidelines is to improve the quality of teaching and learning in the area of the practice of CP, especially OCP, within the scientific discipline and profession of psychology.

Towards these ends, this document is intended as guidance for psychologists who teach or plan curricula for teaching CP/OCP at doctoral or postdoctoral levels of professional education and training in psychology. The guidelines are structured in the form of *overarching principles, general competencies, and level-specific competencies* that are ideally obtained by persons receiving training at the doctoral or postdoctoral level in CP/OCP (see Figure 1).

Revision Process

This revision was undertaken, in accordance with guidance from the APA (2004a) in relation to Association Rule 30-8.3, to ensure currency of guidelines related to both their scholarly basis and their practical use.

The procedure for gathering input on needed revisions to these guidelines, which took place in 2015, included interviewing thought leaders in the field of consulting psychology from the following groups: authors of the 2005 guidelines, members of the Society of Consulting Psychology (SCP)/Division 13 E&T Guidelines Revision Committee, and the co-chairs of another competency-related project in SCP specific to coaching; as well as surveying members of SCP. The goal of both methods was to collect feedback on the strengths, weaknesses, and gaps that should be addressed in a revision of the 2005 guidelines. In addition, the revision committee reviewed other published guidelines that relate to other areas of psychology and to specific issues or competencies covered in this document to evaluate suitability to be referenced for a more in-depth treatment of a given issue.

The general consensus that emerged from this process was that the guidelines were largely solid and a revision should not aim to make substantial substantive changes but rather to update language and information, address contemporary issues that impact consulting work (such as increased diversity along multiple dimensions as well as the hypergrowth of technology and its permeation of all aspects of work), leverage other relevant guidelines and bodies of work that could add value to the discussion herein, enhance the section on organization-level competencies, tighten up the organization of the document, and provide a reading list of OCP resources to support the professional development of consulting psychologists. These changes are addressed in Appendix E.2. *Organizational Consulting Psychology Bibliography*.

Other issues raised, though not by a majority, included supervision, licensure, master's education and training, and adding a fourth "level" to the OCP competency framework that would address large system change beyond organizations (e.g., communities, industries, transnational systems). The importance of supervised experience is more explicitly emphasized in this revision, particularly in the section on what are now organized as the personal and procedural general competencies, but for a fuller discussion of best practices in supervision in OCP, see Blanton (2014), which also touches on the current status of the licensure discussion. Licensure is addressed as well in Appendix E.3. *Ways to Learn About and Develop Skills in Consulting Psychology*. Regarding the issue of master's-level training, it was agreed that a common set of competencies to guide curriculum development is adequate at this point and does not preclude other curricular differences appropriate to the goals of the two different degrees. This is in keeping with the most recent guidelines published by the Society for Industrial and Organizational Psychology (SIOP), which conclude that "distinctions between master's-level and doctoral-level training might lead to substantial differences in the two levels of training. However, none...suggests that the basic content of the field changes as a function of the level of education. Thus, only one set of competencies is provided within these guidelines" (SIOP, 2016, p. 2). Addressing a fourth level for consulting psychology was determined to be important enough an issue not to be attempted within the scope of this current revision. From this process, a draft was produced that the SCP Executive Board reviewed and final edits were then incorporated into this final document.

Definitions

Consulting psychology, a practice that focuses on consultation to, with, or for individuals and organizations at individual, group, and organization/systems levels rooted in multiple areas

of substantive expertise, is used here as defined in the 1999 Bylaws of the Society of Consulting Psychology (SCP), Division 13 of the American Psychological Association (APA):

Consulting psychology, for the purposes of these By-Laws, shall be defined as the function of applying and extending the special knowledge of a psychologist, through the process of consultation, to problems involving human behavior in various areas. A consulting psychologist shall be defined as a psychologist who provides specialized technical assistance to individuals or organizations in regard to the psychological aspects of their work. Such assistance is advisory in nature and the consultant has no direct responsibility for its acceptance. Consulting psychologists may have as clients individuals, institutions, agencies, corporations or other kinds of organizations (www.div13.org/bylaws.aspx).

Also relevant to these guidelines is the general definition of psychological practice noted in the APA “Model Act for State Licensure of Psychologists” (APA, 2011) and the Association of State and Provincial Psychology Boards (ASPPB) “Model Act for Licensure of Psychologists” (ASPPB, 2010). Related to this revised guidelines document, it should be noted that the most recently adopted version of the Model Act states that “language has been revised throughout the document to make it more inclusive of non-health service psychology, most notably industrial-organizational psychology,” which is reflected, for example, in references to “consultation” and “organizational effectiveness.” Additionally, the latest Model Act recognizes that “new technology and increased mobility of psychologists has necessitated the development of new language to address interjurisdictional practice, and the delivery of psychological services by electronic or other means (i.e., telepsychology).” This latter point, which was also raised in the feedback gathered for this revision, as previously noted, is reflected in the addition of

“technology” to the “business operations” competency in these revised guidelines. *Practice of psychology* is defined (ASPPB, 2010, pp. 7-8) as follows:

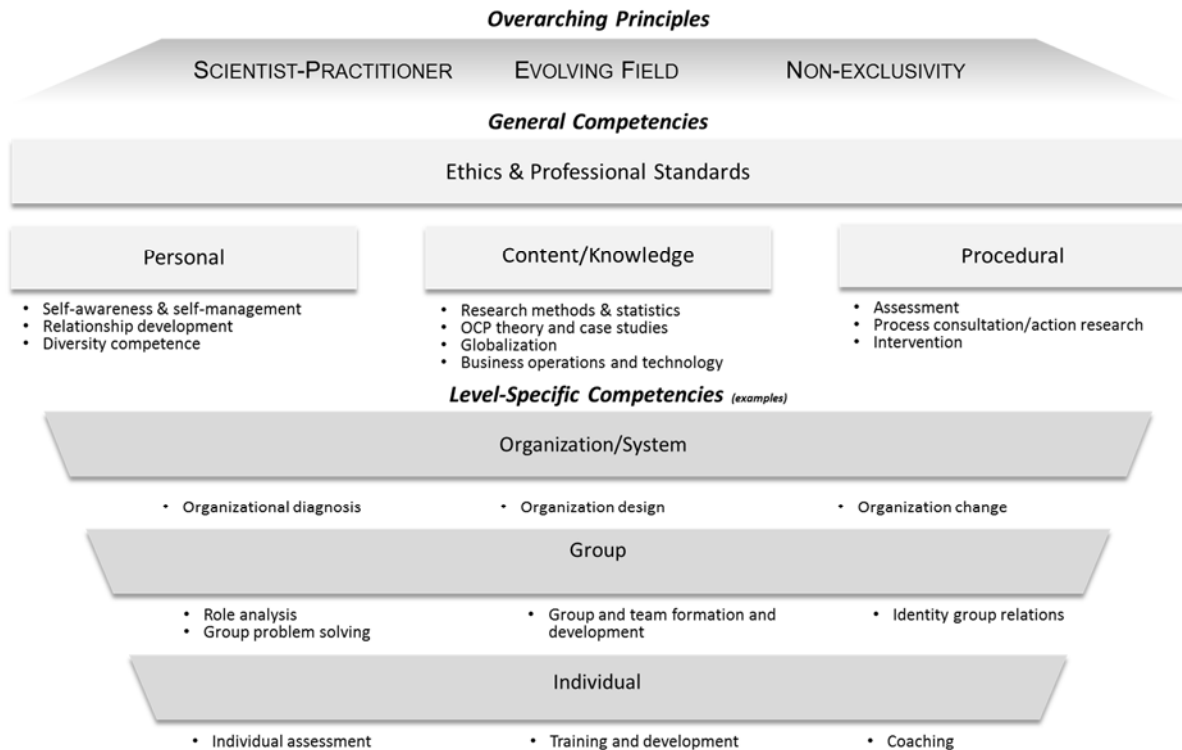
the observation, description, evaluation, interpretation, prediction and modification of human behavior by the application of psychological principles, methods, and procedures, for the purposes of preventing, eliminating, evaluating, assessing, or predicting symptomatic, maladaptive, or undesired behavior; evaluating, assessing and/or facilitating the enhancement of individual, group and/or organizational effectiveness – including personal effectiveness, adaptive behavior, interpersonal relationships, work and life adjustment, health, and individual, group and/or organizational performance; or assisting in legal decision-making. The practice of psychology includes, but is not limited to, psychological testing and the evaluation or assessment of personal characteristics, such as intelligence; personality; cognitive, physical, and/or emotional abilities; skills; interests; aptitudes; and neuropsychological functioning; counseling, consultation, psychoanalysis, psychotherapy, hypnosis, biofeedback, and behavior analysis and therapy; diagnosis, treatment, and management of mental and emotional disorder or disability, substance use disorders, disorders of habit or conduct, as well as of the psychological aspects of physical illness, accident, injury, or disability; psychoeducational evaluation, therapy, and remediation; consultation with other psychologists, physicians, other health care professionals and patients regarding all available treatment options, including medication, with respect to provision of care for a specific client or patient; provision of direct services to individuals and/or groups for the purpose of enhancing individual and

thereby organizational effectiveness, using psychological principles, methods and/or procedures to assess and evaluate individuals on personal characteristics for individual development and/or behavior change or for making decisions about the individual, such as selection; and the supervision of any of the above.

Psychological services may be rendered to individuals, families, groups, systems, and/or organizations. The practice of psychology shall be construed within the meaning of this definition without regard to whether payment is received for services rendered or if the practice was conducted in person or via electronic means.

Finally, these guidelines are framed as a set of *competencies*, with competency having the commonly accepted definition of a capability that encompasses knowledge, skill and ability. Thus, the framework discussed herein lays out the capabilities that a doctoral-level consulting psychologist should learn and be able to apply.

Figure 1. Overview of Consulting Psychology/Organizational Consulting Psychology Guidelines



Overview of the OCP Competency Framework

Areas of Training Addressed

This document proceeds from three overarching principles and 11 general areas of learning competencies, culminating in competencies specific to three domains or levels of organizational consulting psychology: *individual*, *group*, and *organization/systems* (I-G-O). Although there are other applications of CP for which alternative or additional competencies may be relevant (e.g., health-, military-, or school-related CP), the specific areas of expertise addressed in this document relate to CP as it is applied to organizational consulting psychology (OCP). These guidelines are not intended to replace, usurp, or conflict with training policies or principles that have been developed and approved for other areas of practice such as those in industrial/organizational, clinical, counseling, or school psychology. In fact, these guidelines recognize the significant value that other standards and guidelines can provide in concert with these guidelines, which do not seek to recreate those in-depth resources but instead to focus in on

the set of individual, group, and organization/systems competencies uniquely relevant to organizational consulting psychology and to leverage other resources as appropriate by referencing them where relevant. Users of these guidelines are encouraged to refer to such references for a more thorough treatment of specific areas or topics (e.g., the use of technology in psychology practice, multicultural competence).

Figure 1 provides an overview of the CP/OCP guidelines in the form of a competency framework guided by, or premised by, the three overarching principles. The framework comprises 11 general competencies common to the effective practice of CP/OCP and a number of level-specific competencies. The 11 general competencies are organized into the personal, knowledge-based, and procedural domains with Ethics and Professional Standards as a foundational anchor. The specific competencies are organized by the level at which the consulting is *primarily* directed —individual, group, and organization/systems (I-G-O).

Overarching Principles

The overarching principles include: (1) recommended adherence to the *Scientist–Practitioner* model; (2) *Evolving Field* - recognition of the evolving nature of the field; and (3) *Nonexclusivity* - acknowledging the multiple avenues for preparation for various roles as a consulting psychologist (also referred to as equifinality). These are the acknowledged assumptions and psychological context within which the OCP competencies are framed.

General Competencies

The 11 general competencies as detailed and promulgated by APA specialists in those topics show the psychological context within which the OCP competencies function. In this revision, competence in (1) *Ethics and Professional Standards* is explicitly emphasized as a

foundational competency that permeates all other competencies, as illustrated in Figure 1. The remaining nine general competencies are grouped into personal, knowledge-based, and procedural types in acknowledgment of the relative - though not exclusive - emphasis in training approach or methodology for each. The development of personal competencies requires a greater emphasis on feedback, reflection, interpersonal exposure and personal growth/maturation, all augmented by supervision; these competencies include: (2) *Self-Awareness and Self-Management*; (3) *Relationship Development*; and (4) *Diversity Competence*. The development of the more knowledge-based competencies requires a relatively greater emphasis on exposure to concepts and content domains; these include: (5) *Research Methods and Statistics*; (6) *OCP Theory and Case Studies*; (7) *Globalization*; and (8) *Business Operations and Technology*. The development of the procedural competencies requires a relative emphasis on applied practice with supervision and is heavily influenced by the ethical, personal, and knowledge-based competencies; these procedural competencies include: (9) *Assessment*; (10) *Intervention*; and (11) *Process Consultation/Action Research*.

Level-Specific Competencies

These CP/OCP guidelines address attention to specific competencies pertinent to the work of consulting at each of three levels: (1) *Individual Level Competencies*, (2) *Group Level Competencies*, and (3) *Organization/Systems Level Competencies*.

These three elements of the OCP guidelines framework – overarching principles, general competencies, and level-specific competencies – are elaborated below.

Overarching Principles

Scientist–Practitioner Assumptions

Consistent with the orientation of the SCP/Division 13 of APA, these revised guidelines reaffirm the importance of CP/OCP being guided by the *science* of psychology in evaluating and assessing the effectiveness of interventions and assessment methodologies used in the *practice* of OCP. *This reaffirmation recognizes that the scientist-practitioner principle is too often inadequately enacted and that this requires “changed behavior on the part of both practitioners and of researchers” (Lowman, 2012, p. 151).* The use of the term *interventions* here is consistent with the work of Dougherty (2000), who defined *interventions* as activities both the consultant and the client agree have a high probability for solving the problem at hand.

It is recommended that the consulting psychologist be competent to conduct and/or to evaluate and to utilize scientific-based research in the practice of CP/OCP. The effective consulting psychologist, ideally, has in-depth knowledge of the major theoretical models in psychology and of their particular methodologies and intervention strategies as they apply to individual, group, and organizational consulting domains. CP/OCP embraces a scientist–practitioner model (Baker & Benjamin, 2000; Stricker, 2000) of training, including training in traditional research skills (e.g., statistics, research design, test construction).

No single model of empirical research, however, is assumed to have a monopoly on truth by the endorsement of the scientist–practitioner model of consultation. CP/OCP trainees learn, for example, not just about research methodologies but also about the role of the consultant as an active participant in the consulting process at hand (Lippitt & Lippitt, 1978). Action research, an assessment or study of the situation and problem undertaken by the consultant prior to the implementation of particular consultation services or interventions, is traced to Kurt Lewin

(1951). An example of such practice in OCP is the joint consultant– client determination of an organization’s needs or critical problems and ideal outcomes, sometimes called *calibration consultation*, a process that is important when applying complex constructs to practical problems (Schein, 1985), especially in international or multicultural organizations (O’Roark, 2002).

Evolving Field

CP and OCP have evolved over time. The body of knowledge and methods of service delivery have continued to grow over the past few decades, stimulated by the writings and publications of former SCP president Thomas Backer (1982a, 1982b). DeWayne Kurpius, who was the 1991 winner of SCP/APA Division 13’s award for lifetime achievement in consulting to organizations, prepared a consulting psychology reading list for a survey conducted while he was the Education and Training Committee chair for SCP (Robinson-Kurpius, Fuqua, Gibson, Kurpius, D., & Froehle, 1995). The list was similar to a 1999 SCP survey of “the best of the century” in consulting psychology, which reported the names of psychologists with the greatest influence on contemporary consulting psychologists, as well as listing 68 authors and 93 titles (O’Roark, 2007), e.g.: *Organizational Diagnosis* (Levinson, 1972); *Process Consultation* (Schein, 1969); *Intervention Theory and Methods* (Argyris, 1970); and *The Theory and Practice of Mental Health Consultation* (Caplan, 1970). Carl Rogers is cited six times. Three of these nominations are for his book *Freedom to Learn* (Rogers, 1969). Edgar Schein received four citations, two for his book *Organizational Culture and Leadership* (Schein, 1985, 1992) and two for *Process Consultation* (Schein, 1969). Other top-rated writings are those of Block (1981/1999), Caplan and Caplan (1993), Katz and Kahn (1978), Lippitt and Lippitt (1978), Senge (1990), and Tobias (1990).

More recently, Rodney Lowman, an eminent leader in consulting psychology and in SCP, has curated one of the most comprehensive and in-depth edited volumes on the field available in *The Handbook of Organizational Consulting Psychology* (Lowman, 2002), which features contributions from seasoned experts in the field, many from SCP/Division 13, on a wide range of issues germane to these training guidelines. Thought leaders in the field have also grappled with and responded to contemporary movements and issues, including the rise of coaching as a sub-discipline; the implications of technology for consulting psychology; the impact of social, political, and cultural change on consulting science and practice; and the issues of supervision and licensure in training and practice. Note the affiliation that SCP entered into with the International Society for Coaching Psychology (ISCP) in 2012 to advance the discipline of coaching psychology, and the partnership of these two bodies in a joint conference on the topic in 2015, the output of which was published in a special issue of SCP's *Consulting Psychology Journal* under the title *International Perspectives on Becoming a Master Coaching Psychologist*. The rise of technology and its demands on psychological practice are evidenced by the development of *Guidelines for the Practice of Telepsychology* (APA, 2013). And the field has responded to ongoing demographic and socio-political shifts, that will continue to require evolution, with guidelines related to a number of diversity variables (see the discussion of *diversity competence* below).

OCP will continue to evolve and sometimes to use techniques that have received limited research investigation, which creates some tension with the scientist-practitioner ideal. The concern is to do so in an ethical manner. Standard 2.01(e) of the *Ethical Principles of Psychologists and Code of Conduct* (APA, 2002) was specifically written to provide guidance. It states,

(e) In those emerging areas in which generally recognized standards for preparatory training do not yet exist, psychologists nevertheless take reasonable steps to ensure the competence of their work and to protect clients/patients, students, supervisees, research participants, organizational clients, and others from harm. (p. 1064)

This standard is highlighted in regularly offered ethics workshops sponsored by SCP and is also attended to in articles published in the division's two official publications, *Consulting Psychology: Practice and Research*, a journal, and *The Consulting Psychologist*, the division newsletter.

Nonexclusivity

SCP/APA Division 13 recognizes the diverse nature of the field of CP/OCP. Its practitioners come from a variety of academic and professional backgrounds, and there are multiple paths of entry into the field. Many practitioners come from a background in clinical/counseling psychology or industrial-organizational psychology, both of which provide considerable training that is relevant for the practice of CP (see, for example, the SIOP [2016] training guidelines). In fact, some of the most innovative training models for CP/OCP practitioners are emerging in programs described as “business psychology,” “social-organizational psychology,” or that include multidisciplinary training in psychology and business administration. Additionally, practitioners of CP/OCP often ground their work in the research and scholarly work that evolves out of other fields. For example, applied research and practice in sports psychology, a field historically prominent in European psychology (Foster, 2002), and academic training applied in areas such as health psychology (Lloyd & Foster, 2006; Lloyd & Veneziano, 2002) have proved useful to the practice of CP. Some of the resources available to

complement any one specific training path include the *APA Handbooks in Psychology* series (www.apa.org) as well as, of course, the more targeted *APA Fundamentals of Consulting Psychology* series (e.g., Lowman, 2016) as well as a number of other handbooks and series, published for example by Sage and Jossey-Bass, (e.g., Lowman, 2002).

Beyond training, the demands of consulting as a discipline require flexibility and continual adaptation to meet the changing needs of clients who seek CP/OCP services. Therefore, by necessity, the field of CP/OCP must cultivate its own diversity, which is facilitated by a stance of nonexclusivity.

These guidelines are intended to assist in the specific development of doctoral programs, postdoctoral training, and continuing education institutes/workshops in CP/OCP. The guidelines and references have been prepared to reflect the current state and historical development of the OCP field, highlighting the contributions of SCP/APA Division 13 leaders, and to provide a conceptual framework for the development of training programs. It is expected that these CP/OCP guidelines will continue to change over time to keep pace with advances in research and practice.

General Competencies

These CP/OCP guidelines comprise sets of competencies needed for CP practice in work and organizational contexts. The document intentionally identifies *recommended competencies* (or “end states”) rather than presenting “model curricula” or specific course work since there are multiple ways to obtain the desired competencies. Indeed, innovation in doctoral and postdoctoral training methodologies for helping students achieve these competencies is encouraged.

Foundational Competency: Ethics and Professional Standards

Professional ethics and standards compliance is considered as a pervasive, general competency in the CP/OCP guidelines model. Knowledge of the psychologists' code of ethics will permeate each of the three levels of interventions; it is also re-addressed in the concluding section of these CP/OCP guidelines. Particular references to the APA code of ethics are included in several sections of these guidelines, for example, Standard 2: Competence (General Competencies, *Assessment*, paragraph 3); Standard 4: Privacy and Confidentiality (I. Individual-Level Consulting Psychology Competencies, paragraph 7); and Standard 9: Assessment (I. Individual-Level Consulting Psychology Competencies, paragraphs 2 and 4).

The ethics code was written with general language, including modifiers such as “reasonably,” “appropriate,” and “potentially,” which requires the application of judgment, which should be explicitly developed through training and supervision. Handelsman, Gottlieb, and Knapp (2005) note that “if ethics training is limited primarily to learning rules, then students may not appreciate the extent to which the need for sound ethical thinking will permeate their professional lives. The development of an identity as an ethical psychologist is a far more complex matter that deserves greater attention (p. 59).” Thus, in addition to familiarity with the code, it is important to be familiar with various models for and factors involved in ethical decision-making. Indeed, there is a growing literature regarding such models and factors. Examples include Handelsman, Gottlieb and Knapp's (2005) acculturation model; Pope and Vasquez's (2016) 17-step decision-making model; Vergés' (2010) approach to integrating contextual issues; and Rogerson, Gottlieb, Handelsman, Knapp and Younggren's (2011) discussion of nonrational processes that impact ethical decision making. Reflection on,

discussion of, and application of such models in the course of understanding and grappling with ethical issues can promote the development of ethical thinking and decision-making.

Personal Competencies: Self-Awareness and Self-Management; Relationship Development; Diversity Competence

The original guidelines rightly emphasized the role of *self-awareness/self-management* and *relationship development* as prerequisites for all areas of psychological practice. These revised guidelines reiterate the primacy of these and pull into that fundamental set what was previously referred to as multicultural and international awareness but which is herein referred to as *diversity competence* to address all types of individual and social difference, including multicultural, international, and identity group. This is a higher order competency in that it requires elements of the first two competencies (e.g., awareness of one's own social identity, awareness of one's biases, empathy for those who are "other," and the ability to build relationships across difference). All three of these personal competencies apply in each of the levels of consulting services – individual, group, and organization/systems.

The capacity for developing self-awareness and self-management can be strengthened and deepened in a wide variety of ways. Graduate-level and post-doctoral education, practicums, and internship work pertinent to these competencies ideally include close critiquing of personal value and belief systems as well as analysis of interpersonal exchanges with colleagues and clients. The development of this capacity for self-directed reflection is facilitated by one-on-one supervision.

Through practicums and internships, psychologists also learn how to build constructive, collaborative relationships with a variety of types of people and organizational representatives.

They learn how to maintain both objectivity and personal engagement as they work with clients to further specific consultative goals.

Given the diversifying effects of globalization, technology, demographic changes, generational shifts and increased public awareness of individual and social identity differences, consulting psychologists acquire appropriate understanding of and sensitivity to issues of diversity. This competency applies to consulting with multicultural clients in one's home country as well as in international settings and with clients from the full range of "identity groups" (defined to include but not be limited to national heritage, age, occupational field, educational experience, social class, gender, race, ethnicity, culture, gender identity and expression, sexual orientation, disability status, and geographic location [e.g., rural, remote]) (Dana, 2001; House et al., 1999; O'Roark, 2002; Sue, Arredondo, & McDavis, 1992; Triandis, 1987).

Moreover, attention should be paid to the "intersectionality" of multiple identity dimensions. As noted in the Guidelines for Psychological Practice with Lesbian, Gay, and Bisexual Clients (APA, 2012, citing Cole 2009), the "concept of intersectionality is used to characterize the variable, differential, and unique effects of constructs such as race, ethnicity, culture, gender, age, sexual orientation, class, and disability on the individual's life. Intersectionality is defined by multiple categories of identity, difference, and disadvantage (p. 20)." In keeping with attention to the complexity inherent in diversity, it is also important to understand the dynamics of a context, such as racial dynamics or social class dynamics within a setting or geographic region.

"Acknowledging the potential for the self to inadvertently cause harm to clients through acts of omission or commission, whether from ignorance or arrogant assumption, the

international [or ‘diversity competent’] consultant takes time to hone the self-as-instrument” (O’Roark, 2002, p. 520). This involves an ability to receive appropriate critical feedback from clients and colleagues and a willingness to change behavior as needed (without violating essential ethics) to work effectively with individuals with diverse identity-group, organizational-culture, and social backgrounds in work-related contexts. It is recommended that organizational consulting psychologists have learning experiences that expose them to models and methods for accomplishing these tasks and demonstrate a reasonable ability to implement them. Such learning experiences should ideally include direct exposure to and supervised work with diverse contexts and audiences (e.g., international exchange programs or work assignments).

Additionally, resources relevant to this competency include the *Guidelines on Multicultural Education, Training, Research, Practice, and Organizational Change for Psychologists* (APA, 2003), *Guidelines for Psychological Practice with Lesbian, Gay, and Bisexual Clients* (APA, 2012), *Guidelines for Psychological Practice with Transgender and Gender Nonconforming People* (APA, 2015), the *Resolution on Gender and Sexual Orientation Diversity in Children and Adolescents in Schools* (APA & NASP, 2015), and APA resources on working with older adults, including *Multicultural Competency in Geropsychology* (APA, 2009) and *Guidelines for psychological practice with older adults* (APA, 2013) (see also Glover & Friedman, 2015 and Lowman, 2013). Resources supporting the acquisition of a global perspective and an understanding of how work, organizational culture and leadership relate to national culture and political-economic context include both contemporary news sources (e.g., newspapers, business magazines) and empirically-based publications (see, for example, Hofstede, Hofstede, & Minkov, 2010 and Bhagat, Triandis, & Mcdevitt, 2014).

While genuine, appropriate behavior is considered germane to effectiveness in every consulting venture, working with international clients, multicultural workgroups, and members of different identity groups brings the consultant's credibility and relevance under intensified scrutiny. The challenge for the organizational consultant is to temper interventions with consideration of the client's perspective and context as well as awareness of one's own and how they relate to the client's. The total of such dynamics is referred to as becoming "culture-centered" in the APA Multicultural Guidelines (APA, 2003).

In the interest of articulating a way of proactively addressing the "anticipated impact of the proposed guidelines (applying skills, techniques, and models included in these guidelines) on diverse individuals and groups" (APA, 2004a, p.10) with respect to corporate culture, gender, individual, and role differences, the published model for an international organizational consulting process is a variation on the *calibration consultation* model used for working in the United States with multicultural work groups, unique structural configurations, and employee subgroupings such as gender, first-language groups, payroll groups, and union–nonunion employees. The process is adapted from the full-cycle "action research" process, which calls for the consultant to learn the organization's culture before imposing an intervention. Calibration and *guanxi* (Chinese for instrumental relationship development) are terms that call attention to the need for the consultant to calibrate cultural dimensions and build relationships in the client organization before recommending any type of psychological intervention or organizational improvement activity (see the section of this document labeled III. Organization/Systems-Level Consulting Psychology Competencies).

Finally, Consulting Psychologists have the duty and opportunity to work within the legal and behavioral frameworks of anti-discrimination and employment rights laws, including, among

others, Title VII of the Civil Rights Act of 1964, Americans with Disabilities Act (ADA) and others enforced by the Equal Employment Opportunity Commission (EEOC). Consulting Psychologists understand, advocate and implement in their work the legal rights, responsibilities and opportunities for employers, employees and prospective employees.

With regard to all three of these personal competencies, curricular descriptions and policies of postdoctoral programs are suggested as ways to inform learners how the faculty assists with the achievement of professional and psychological maturity necessary for effective practice in the field.

Content/Knowledge-based Competencies: Research Methods and Statistics; OCP Theory and Case Studies; Globalization; Business Operations and Technology

Research methods and statistics competencies are one important mechanism through which the scientist-practitioner principle is realized. Having knowledge of and experience with research enhances one's ability to bring empirically-based practice to bear in that it allows a consulting psychologist to understand, critically evaluate, and apply published research findings. These same skills allow a consulting psychologist to avoid applying practices that are not well-founded. Moreover, taking a rigorous action research approach to applied practice promotes the transfer of learning from practice back to research for those who take the time to write up their cases and experiences. Finally, facility with research methods and statistics is important in that these same skills are used in assessment and the analysis of data collected on individuals, groups, and organizations (e.g., conducting surveys, interpreting formal assessment data) as well as in designing effective interventions. An added benefit of facility with data analysis and statistics is that it provides a good beginning base for understanding business operating finances as well.

OCP consultants who do not develop comfort and competence in reading organizational financial reports and budgets will be at a distinct disadvantage when competing with business administration management consultants or when coaching high-level executives.

Knowledge of *OCP theory and case studies* serves as the substantive and applied scholarly foundation for engaging in OCP. Knowing the history, scope, and watershed applications of consulting psychology proves practically useful in preparing the consultant for designing interventions and for establishing credibility with organizational clients, who often read the management books that fill the airport shelves and enjoy telling their own versions of the good and the bad experiences with consultants.

An understanding of *globalization*, the removal of economic, movement, and communication barriers that promotes integration of markets, trade, and ideas, and its implications for OCP, has become a requirement for consultants. Knowledge of *globalization* interacts with the personal competency of *diversity competence*, as suggested in that section. Regardless of what type of organizational client a consultant is working with (e.g., business, non-profit, non-governmental organization, educational institution, military group), globalization has some degree of influence. The impact of globalization may be obvious when organizations already operate or expand their operations internationally, but it is also important for organizations based in one country, which still must function within a broader global environment characterized, for example, by interdependent economies (as evidenced by the financial crisis that began in the United States in 2008 and rippled through the world economy for years) and by an increasingly multicultural workforce and constituent base.

In the context of accelerating globalization, organizations and their leaders face an intensified need to lead people, manage stakeholder relationships, and build organizational

cultures across traditional national boundaries. As such, an understanding of cross-cultural dynamics has become increasingly important. This places a growing demand on CPs/OCPs to possess expertise in new areas. In particular, they need to understand how effective leadership styles differ from culture to culture (Hofstede, Hofstede, & Minkov, 2010), as well as how elements of national culture are likely to influence organizational dynamics (Bhagat, Triandis, & Mcdevitt, 2014). More and more, this expertise will serve as an important lens through which CPs/OCPs assess and intervene across individual, group, and organizational/systemic levels.

Understanding business operations and technology applies both to “business” generally (to understand the operations and interests of client organizations, whether for-profit or not) and to the consulting psychologist’s business (i.e., being able to run or contribute to a viable consulting operation), including understanding basic issues of finance, governance, and value creation as well as more specific issues such as the legal constraints on competing for contracts, becoming familiar with industry-wide regulations, etc. Competence in this arena is important both substantively and in terms of the credibility of the consultant.

Similarly, being competent in relation to technology applies to both client organization and practitioner methods. Regarding the client organization, technology-related competence means having at least a basic understanding of technology in and around the client and the implications of that technology on the issues addressed in consulting (e.g., individual overload and stress from 24/7 connectivity; virtual, technology-enabled teams; digital transformation, including culture change, to support an evolving strategy). Regarding technology as used by the practitioner, it is now an expectation that all consulting professionals be competent in the use of technology in the delivery of their services and that they understand and can communicate the impact of technology on and to clients. As the APA Telepsychology Guidelines (2013) state

two of the most salient issues that the Telepsychology Task Force members focused on when creating this document were the psychologist's own knowledge of and competence in the provision of telepsychology and the need to ensure that the client/patient has a full understanding of the potentially increased risks to loss of security and confidentiality when using technologies (p. 793).

Procedural Competencies: Assessment; Process Consultation/Action Research;

Intervention

Assessment is considered to be not only a general competency but also a pivotal CP/OCP competency in all three I-G-O consulting levels. It is given special attention here as a general competency to begin to highlight the aspects distinctive to OCP. Ryan and Zeran (1972) usefully defined assessment as (a) disciplined analysis of (b) a present situation that requires (c) determining what pertinent elements combine to (d) generate the current situation. Ideally, interactions among the pertinent elements can be synthesized into a new alignment that provides means for optimizing system outcomes.

Assessment competencies for organizational consulting can be depicted on dual continua: scientist–practitioner and theory to practice. While assessment approaches, methods, and instruments vary dramatically according to the I-G-O level of focus and cultural context, skills to be developed in assessment, regardless of I-G-O focus, include identifying (observing, using logical deduction), integrating (classifying), and inferring (matching evidence to goals and assessment schemas) in order to assist in decision making, in implementing change, or in improving understanding (Barclay, 1991). Assessment, generically, is the systematic process of making inferences in order to arrive at a diagnosis for use in informed decision making regarding interventions. Special attention to and need for assessment in preparation to work with

multicultural groups and international organizations is highlighted and defined in the calibration consultation model (O’Roark, 1995, 2007).

The pervasive aspect of competence (Standard 2 of the *Ethical Principles of Psychologists and Code of Conduct*, APA, 2002) in systematic, formal assessment across the three interactive levels (I-G-O) is recognized by representing psychological assessment as a general competency in these CP/OCP guidelines (see Figure 1).

Similarly, *process consultation* (Schein, 1969, 1985, 1987, 1999) is an important general competency and OCP competency in each I-G-O level. Schein considered process consultation to be integral in a philosophy of helping that stands in contrast to medical (doctor/expert) consulting approaches. While he advocated never depriving a client (individual, group, or system) of one’s expertise, Schein (1989) detailed the value of starting in a process consultation mode, which means working from several basic assumptions:

clients . . . seek help when they do not know exactly what their problems are . . .
the help they really need is in figuring out exactly what is wrong . . . most clients
do not know what kinds of help are available and what kinds of help are relevant
to their problems . . . many of the problems in human systems are such that clients
. . . would benefit from participation in the process of making the diagnosis . . .
only clients know what form of remedial intervention will really work because
only they know what will fit their personalities and or group or organizational
cultures. (p. 5)

Process consultation/action research is included in these CP/OCP guidelines as a general competency goal. Process skills contribute to a number of other competency areas and illustrate a

hallmark expertise in OCP. Process skills are integral to organizational assessment and in most forms of intervention.

Intervention, or activity that consultant and client agree will likely be effective in addressing the problem (Dougherty, 2000), refers to the psychological procedures and processes introduced into the organization. Standard, classical activities and innovations or variations fill volumes of “how to” books, such as the early University Associates publication of Pfeiffer and Jones’s (1975) series called *Structured Experiences for Human Relations Training*, now published as handbooks by Jossey-Bass.

Level-Specific Competencies

Level-specific competencies are organized into three broad domains of psychological expertise that are considered important in becoming competent as an organizational consulting psychologist: individual, group, and organization/systems (I-G-O). This I-G-O model is primarily intended for organizing and conceptualizing purposes when thinking about curriculum design issues and continuing education programs; it is assumed that, to some degree, competencies in each level will interact with one another and that the effective practice of CP/OCP draws simultaneously on competencies relevant at each of the levels.

Although specific competencies do not always neatly fit within a single domain, grouping by focal categories of the organization levels serves as a useful organizing metric in thinking through the issues of how best to train people to become consulting psychologists. Within each of the three levels, a series of specific competencies is identified as having primary, but not exclusive, relevance to that intervention domain. Illustrative competencies, elaborated in subsequent sections, are listed below.

Primarily Individual-Level Core Competencies

- Individual assessment for purposes of career and vocational assessment
- Individual assessment for purposes of employee selection
- Individual assessment for purposes of employee development
- Job or work analysis
- Individual coaching for performance or development
- Career counseling

Primarily Group-Level Core Competencies

- Assessment of group functioning, effectiveness, and/or processes
- Team development (e.g., team formation, team building, team alignment)
- Forming and coaching or advising group-level teams in organizations (e.g., cross-functional project teams, self-directed work groups)
- Intergroup assessment and intervention (e.g., work processes, information-sharing, conflict, boundaries)
- Facilitating group-level training and development interventions, such as action learning teams
- Helping groups navigate the dynamics of diversity and social identity

Primarily Organization/Systems-Level Core Competencies

- Understanding of organizational theory
- Facilitating the design of effective organizations, with attention to structures and processes
- Conducting organizational assessment and diagnosis (e.g., performance, culture, engagement, values, management practices)

- Designing and delivering organizational development initiatives
- Supporting organizational change work

In the following sections of this document, the core CP/OCP competencies are elaborated and illustrated. The competencies described here necessarily constitute an abbreviated listing of skills important in becoming a consulting psychologist.

I. Individual-Level Consulting Psychology Competencies

In the individual level, consulting psychologists learn the skills for performing assessments and interventions centered on persons as separate entities in organizational and work contexts. It is recommended that consulting psychologists learn the knowledge, skills, and abilities required to assess and intervene with individuals in nonclinical work- and career-related contexts and how to differentiate between situations requiring assessment or intervention with abnormal psychological conditions and those with the more normal range of behavior.

A. Individual-Level Assessment

Doctoral-level consulting psychologists understand and learn to competently employ individual-level assessment methods and techniques appropriate for the types of problems and issues confronted by individuals in work, career, and organizational contexts. They become competent in psychometric issues in individual assessment and in procedures for conducting valid individual-level assessments and evaluations for purposes of career assessment, personnel selection, personal development, and in the context of determining appropriateness for, and specific needs of, coaching and counseling of persons in the work and career context. Such assessments are based on relevant evaluations using, as appropriate, psychological tests and other assessment procedures and include understanding of the legal and regulatory context in which

individual assessments occur (*Ethical Principles of Psychologists and Code of Conduct*, Standard 9; APA, 2002).

The consulting psychologist learns to understand intrapsychic-level dynamics and socio-cultural dynamics affecting observed individual behavior and can integrate this information into decision making regarding interventions appropriate for the client's situational context. CP individual-level assessment skills do not normally include assessment of abnormal personality or mental dysfunction except to the extent that the consulting psychologist learns to recognize what impacts on work performance and, then, to differentiate persons whose individual needs may require a different type of intervention, such as a referral for a formal mental health evaluation or intervention.

Doctoral-level consulting psychologists learn individual-level assessment methodologies, including skills required for the administration and interpretation of a representative-level sample of relevant instruments and in providing feedback to individuals completing such measures (*Ethical Principles of Psychologists and Code of Conduct*, Standard 9; APA, 2002). These guidelines intentionally do not specify a list of assessment devices, procedures, or psychological tests (e.g., specific measures of occupational interests, abilities, and personality traits) in which consulting psychologists become competent, since any such list would quickly become outdated or irrelevant. It is advised that the consulting psychologist learn meta-skills in individual-level psychological test administration, interpretation, and feedback and experience administering, interpreting, and providing feedback with a sufficiently large number of scientifically sound instruments that new tests can quickly be mastered as they become available. As Cummings (2002) points out, it is also advised that the consulting psychologist gain experience assessing a diverse range of clients. Bringing diversity competence to assessment competence would mean

supervised experience with clients representing a variety of cultures, backgrounds and identity groups.

For competence in working at the individual level, the consulting psychologist learns to define relevant assessment questions, to choose appropriate instrumentation, to administer the relevant tests, and to provide feedback, both test results and pertinent behaviorally based feedback, to all relevant parties. Feedback includes helping the individual(s) assessed (and other relevant parties, such as third parties) understand the results and limitations of the assessment, helping to place the results in the appropriate organizational context, such as company culture and employee classifications and federal/state regulatory obligations (as represented in payroll categories, union membership, and safety requirements such as hard hats), addressing the affective aspects of such feedback, and helping identify relevant individual–situational (including, but not limited to interpersonal, identity groups, corporate purpose/values/structure/management practices) implications of the results of the assessment. See *Using Feedback in Organizational Consulting* (Gregory & Levy, 2015), in the APA Fundamentals of Consulting Psychology series for more detailed guidance.

Thus, consulting psychologists learn to identify and put into a developmental and organizational context the strengths and limitations of each of several assessment methods: empirical methods (e.g., behavioral, content analysis), psychometric methods (cognition–learning, affect–behavior, cognition–willing, i.e., integrative decision making), and more intuitive methods (projective and other). The history of the development of each methodology is supplemented with detailed exposure to preferred techniques, emphasizing the strengths and limitations that pertain to diagnostic outcomes specific to CP/OCP: classification for description,

evaluation, placement; classification for performance competency; classification for consultant intervention, therapeutic recommendations, or referral for clinical treatment.

At the individual level, the consulting psychologist learns to understand and integrate the various components of psychological assessment (e.g., test results, behavioral observational data, relevant background and life history information) and to synthesize these data into pragmatically relevant results. The consulting psychologist is skilled in a range of individual-level assessment procedures (e.g., objective, projective, structured observation, ethnographic field methods, interviews, ethical standards assuring privacy and confidentiality [*Ethical Principles of Psychologists and Code of Conduct*, Standard 4; APA, 2002]) and applies synthesis thinking to produce integrated results that are germane to the referral question(s) for which the assessment was undertaken.

B. Individual-Level Interventions

Consulting psychologists learn to implement a range of interventions that focus on the individual development level and are sensitive to life span perspectives and individual experiences. These interventions can be classified as educational, training, coaching, and counseling.

1. **Educational.** Consulting psychologists learn how to provide educational-based interventions for individuals. The goal of such activities would be to promote the acquisition and use of new knowledge by clients. The range and depth of such educational interventions will vary greatly and may incorporate various modalities including face-to-face and various telecommunications-based formats.
2. **Training.** Practitioners learn how to provide training interventions for individuals. The goals of such activities are to assist individuals in developing and

strengthening skills relevant to the workplace. The range and types of skills applicable to jobs are enormous, and it is not expected that organizational consulting psychologists be able to demonstrate competency in all of them. However, practitioners are able to assess problems and design skill-building interventions that will help clients manage the challenges that they face.

3. **Coaching.** Practitioners learn how to provide competent, assessment-anchored coaching and other individual-level interventions. The goals of such activities include helping clients to improve their abilities to diagnose problems that they are confronting in the workplace; to change problematic attitudes, values, beliefs, and behaviors that may interfere with their performance; and to improve their skills, self-awareness, and self-efficacy in their work-related roles. Coaching may include education and training interventions as part of a package of activities that are usually negotiated and delivered to a client in the context of a formal agreement. While every consulting psychologist should be capable of holding one-on-one conversations of a coaching nature – i.e., promoting reflection, insight, and/or new perspectives or abilities, typically through greater reliance on inquiry and listening than on directing – coaching in the context of longer-term engagements or developmental relationships that promote potentially deep change in an individual, as in executive coaching, is considered a more specialized and advanced competence. See Vandaveer, Lowman, Pearlman, & Brannick (2016) for a discussion of a professional practice analysis of executive coaching sponsored by SCP and SIOP that forms the foundation of a competency model for this more advanced type of coaching.

4. **Counseling.** Consulting psychologists learn to provide counseling interventions for individuals. The goal of such activities is to help individuals overcome internal psychological or behavioral barriers to the performance of their roles in the workplace. Although consulting psychologists are familiar with and able to apply an array of counseling theories and methods, they are not necessarily expected to be prepared to conduct long-term mental health treatment with clients for chronic or non-work-related conditions. Rather, consulting psychologists refer such clients to appropriately prepared colleagues when they believe that such care is necessary.

Foci for Individually Directed Interventions

CP/OCP training programs prepare practitioners to intervene with individuals in the workplace who may be encountering a wide variety of problems and issues. To be sure and inevitably, the academic and practice aspects of the programs will not be able to expose students to the full array of difficulties and challenges that clients may present to them once they leave school or when transitioning into CP/OCP. However, there are some foci for individual interventions that may be reasonable to include in curriculum and programs. These can include such specific applications as those named below.

Representative Individual-Oriented Consulting Competencies

- Career management
- Coaching on managerial roles and behaviors
- Fostering the development of leadership and followership behavior
- Technical roles in organizations

- Interpersonal relationships and psychosocial challenges, with analysis and accommodation of issues related to diversity (race, gender, gender identity and expression, values, sexual orientation, age, nationality) in organizations
- Intrapsychic aspects of work such as motivation, resistance to change, and emotional management
- Crisis management concerning individual behavior in organizations
- Individual performance in relationship to groups and organizations
- Role conflict management
- Assisting individuals to work effectively in globally oriented, culturally diverse organizations and within a multicultural work force
- Life span perspectives

Course work and practicum experiences in CP/OCP training programs integrate theory, research, technical skills and implementation methods, and approaches to evaluating individually based interventions. Consulting psychologists are, ideally, prepared to design, implement, and evaluate these approaches.

II. Group-Level Consulting Psychology Competencies

Group-level OCP competencies take the group as the primary unit of analysis. The group-level frame of reference pertains both to the interpersonal relations among members of task or cohort groups - including leader-follower behavior, authority dynamics, dealing with diversity/differences, cooperation, collaboration, conflict management, communication, labor-management relations, and interorganizational relations - as well as to the work-related variables such as role definition and alignment, workflow, planning and task coordination, and goal setting and performance tracking.

Crucial propositions are the following: (1) roles in organizations are shaped by group-level forces; (2) individuals in organizations function as representatives of their work group, whether or not they intend to do so; (3) dynamics of task groups cannot be adequately understood independently of the external relations/group-identifications of members of a work group; and (4) unconscious processes within individuals, within groups, and between groups affect individual roles, intragroup dynamics, intergroup relations, and interorganizational relations.

In doctoral and postdoctoral education programs in consulting psychology, psychologists learn how to carry out interventions with groups embedded in organizations. This education includes knowledge about (a) the self in relation to these phenomena, such as personal prejudice and bias, (b) relevant concepts and theories from social psychology, (c) specific and relevant case studies and statistical research results, and (d) social technologies appropriate to the work group. Effective intervention is associated with favorable confluence among all four of these elements. When knowledge and skills (competencies) related to any aspect are missing, or if all are not brought together in a congruous fashion, then additional OCP education is recommended.

The following sections elaborate specific types of group-level assessment and intervention approaches suggested as competencies for which an organizational consulting psychologist is trained: role analysis and renegotiation; group formation and development; group and intergroup problem solving; identity groups and intergroup relations; and group-level interventions.

A. Role Analysis and Renegotiation

The purpose of these activities is to enable individuals in roles within organizations to understand the forces that shape their roles and to take constructive initiatives to adjust those forces that cause dysfunctional consequences for themselves and/or the organization.

Consulting psychologists learn to establish their own roles in relation to their OCP work, know several versions of role theory (including those that take account of group- level processes), become familiar with the research on role dynamics in organizations, and gain competency in being able to diagnose barriers to effectiveness and then assist clients in analyzing and renegotiating their roles.

B. Group Formation and Development

Relevant OCP activities include facilitating group leaders and members to form a group, establishing productive relations between leader and members, developing constructive relations among peers within the group, and fashioning cooperative relations between the focal group and other groups, organizations, and stakeholders with whom the group must interact in order to perform effectively or achieve the group objective.

Note that a team is a particular type of group in which the team membership is relatively stable, the group has shared goals, and the members are interdependent in achieving their goals, at least to some extent. Teams have become an increasingly important focus of attention in both research and consulting practice. For a review of research important to applied work with teams, including both diagnosis and intervention, see Gullette (2015). Another specific type of group that a consulting psychologist may work with is an *action learning group*, whose purpose is the accomplishment of a project in the context of an explicit goal for members to learn and develop (Marquardt, Leonard, Freedman, and Hill, 2009).

Consulting psychologists who provide this service learn to understand their own predispositions toward authority and group dynamics, gain working knowledge of theories of group and intergroup dynamics, become familiar with the empirical research on groups in organizations and the multicultural literature, and learn methods for diagnosing problems of the team, designing interventions to address those problems, and preparing the leader, team members and/or others who may be involved in implementing interventions. The organizational consulting psychologist gains competency in identifying both optimal, positive models of functioning and those that are dysfunctional and/or pathology driven.

C. Work Groups and Intergroup Problem Solving

The organizational consulting psychologist learns intervention skills that assist two or more identified groups with improving their relationship in order to carry out *interdependent work assignments* more effectively. Activities may be developed for operational groups (such as engineering and production or production and sales) that have different functions along a flow of work, between different hierarchical-level groups (such as between field units and headquarters), between entities attempting to merge, between labor and management groups, or between culturally diverse members of the work group. See, for example, Ernst and Chrobot-Mason (2011) for a discussion of “boundary spanning” informed by social psychology theory and applied practice.

Recommended competencies for organizational consulting psychologists who provide these services include learning to understand their own predispositions toward authority and intergroup relations (especially those that involve ethnocentric forms of conflict) in order to determine whether they can proceed to work alone or should invite one or more consultants

representing different perspectives to assist in delivering the service. In situations requiring a team of consultants, which may stem from self-insight, or simply the size of a project and the number of participating client-individuals, organizational consulting psychologists who work together are prepared to manage their relations with one another and in relation to the client in ways that enhance rather than diminish the quality of service.

D. Identity Groups and Intergroup Relations

Identity-group membership includes variables such as race, ethnicity, nationality, family, age, generation, gender, gender identity and expression, sexual orientation, disability, religion, educational status, and social stigma. The OCP goal of interventions is to eliminate group-level forces that result in members of some identity groups within organizations being treated unfairly by members of other identity groups on such matters as work assignments, salaries, and promotional opportunities. Interventions to alter unfairness among identity groups include educational activities that expand the knowledge and self-awareness of individuals and designing and recommending procedures that adjust distribution of authority and power among identity groups within organizations.

Competencies recommended for organizational consulting psychologists who provide these services include methods for assessing their own identities in relation to the client organizations where they provide services and learning strategies for working cooperatively with members of diverse identity groups to effect change (e.g., Whites with Blacks, women with men). They become knowledgeable about theory and research concerning the identity groups and cultures with which they interact, as well as of the intersectionality of multiple identity categories (APA, 2012).

They adapt interventions appropriate to the conditions found in organizations and the diagnosed problems facing work groups. Additionally, OCPs are aware of which groups are particularly susceptible to workplace bias in the absence of federal protections (e.g., groups that are diverse with respect to sexual orientation and gender identity) and develop skills not only to effectively work with those individuals and groups but to advocate for systemic change.

E. Group-Level Interventions

Consulting psychologists learn to apply what they have learned about groups to address specific issues and problems within the organizational/systems context. Relevant competency areas include, for example, managing group conflict, enhancing group functioning so that it is better aligned with organizational objectives, assisting groups in creating conditions of social support to ameliorate the effects of organizational and occupational stress, and helping organizations design work groups that effectively bridge individual and organizational needs.

III. Organization/Systems-Level Consulting Psychology Competencies

This level focuses either on interventions in which an entire organization is the targeted intervention level or in which the organization itself is integral in effecting changes to segments of the larger organization or system. In order for the organizational consulting psychologist to play a useful role in conducting organization-level interventions, recommended competencies include developing, administering, and interpreting surveys (such as organizational culture assessments and employee opinion/satisfaction polls); designing and participating in the leadership of organizational strategic planning and change management programs; conducting organization effectiveness interventions; delivering management development programs; and conducting research and evaluation activities. Competencies recommended in conjunction with this domain of intervention include those addressing organization theory and design;

organizational assessment competencies and organizational diagnosis; organizational change; and the consultation process.

A. Organization Theory and Design

Prior to practicing organization-level assessments and interventions, consulting psychologists learn about organizations, understand structures and systems for organizing work, and develop a solid theoretical foundation from which to make recommendations. Training in organizational theory, behavior, and design are the foundations from which interventions are designed. Capelle (2014) defines organization design as “the relationship of an organization to its environment and the interrelationships of its parts. This includes the alignment of positions, accountabilities and authorities, people, deliverables, and tasks.” (p. 1) Thus organization design goes beyond “boxes and lines” on the organization chart and can be a powerful tool in alleviating problems and enhancing effectiveness in an organization (e.g., by removing “bottlenecks” or aligning incentives to desired goals).

Relevant topic areas to learn about include organizational theory, both modern and historical (e.g., scientific management, the human relations movement, open systems theory, and organizational diagnostic theory); organizational structure and design (e.g., legal structures, centralization/decentralization, matrix configurations); organizational ecology (e.g., the effects of size, growth, market, and life cycle); organizational effectiveness (business planning, financial indicators, industry benchmarking); globalization (economic, social, and legal challenges, multilingual and multicultural issues); organizational diagnosis; and organizational culture and ethics.

B. Organizational Assessment and Diagnosis

The goal of organizational diagnosis is to develop an understanding of a system (purpose, where things are going well, where things are not going well) by its members by using the methods of applied behavioral science. The phases of organizational diagnosis include entry, data collection, analysis, and feedback. The approach to assessing an organization is informed by theoretical perspective as well as by the presenting issue (as in research, the question one is trying to answer). This leads to a wide range of specific tools and methods, which will continue to evolve. Consulting psychologists learn and apply theoretical frameworks, as noted previously, and keep up with the literature (e.g., Alderfer, 2011) and advances in assessment methods, such as the emergence of organizational network analysis as a way to visualize the informal networks of power, influence, and communication that lie alongside the formal structures mapped out in organization charts. Fast-moving innovations in the use of technology with organizational research and practice (e.g., Westaby, 2012) present opportunities but also underscore the challenges of keeping pace from an ethical and competence perspective.

Consulting psychologists who provide this service learn to develop a sound and feasible contract for doing the diagnosis and then how to carry out structured and unstructured observation, individual and group interviews, organic and standard questionnaires, and archival searches. Having obtained data from multiple sources and in various forms, they learn how to conduct appropriate qualitative and statistical analyses and to integrate the results.

The organizational consulting psychologist learns to present the findings from the organizational diagnosis, both orally in appropriately designed meetings and in writing. A full blown organizational diagnosis potentially addresses all of the foregoing areas of group-level

inquiry (i.e., roles, teams, workflow, and identity groups) as well as organizational/systemic constructs. The requirements for proper preparation in each of those areas apply to organizational diagnosis as well. Conversely, methods used in organizational diagnosis are also, often, applied at the group and individual levels of interventions.

Developing expertise in organizational surveying and other assessment methodologies involves learning how to translate theory into applied practice. Skills to be mastered include systematic data collection efforts including survey and test design implementation and evaluation. In learning to design surveys and other measures, attention is paid to item design and evaluation. Practice in developing such measures, pilot testing them on representative samples, and evaluating these pilots can be covered through a combination of class projects and practicums. Expertise in general survey and test design topics might also be addressed, including the effects of factors such as length, methods of distribution (anonymity, paper-and-pencil vs. interactive voice response), and management (database theory and design, data security). In implementation of such assessment projects, skill in client definition (who is the key client, who comprises the client constituency to be assessed) and learning to develop and negotiate clear, realistic contracts remain critical.

Consulting psychologists also learn project skills, including managing a project from initial conceptualization to implementation and outcomes evaluation. As part of this process, consulting psychologists learn to consider such issues as incorporation of key stakeholders, development and execution of communication plans, formative and summative evaluations, and continuous quality and operational improvement of the process itself. Additionally, it is recommended that consideration and costing of alternative organizational assessment procedures

be covered, helping students learn how to compare and contrast the costs and benefits of alternative strategies.

Evaluating diagnostic techniques includes learning to use statistics to examine reliability (test–retest and internal consistency) and validity (content, construct, criterion-related) of assessment devices. It is recommended that classical test methods, and item-based methods such as item response theory, be covered in conjunction with this work. It is advisable for the organizational consulting psychologist to learn a variety of diagnostic assessment methodologies, including those associated with the use of the psychologist him- or herself as an instrument for accurate organizational diagnosis.

C. Organizational Development and Change

The organizational change domain focuses on working with organizations undergoing changes that are atypical for that organization in amount, quality, or both, whereas organizational development is about intentional change with a goal of enhancing the effectiveness of the people, and, thus the organization. A thorough understanding of client preferences concerning perceived change needs, organization design, and theories of organizational change (including drivers of both organizational inertia and organizational resilience) and an understanding of the characteristic psychological processes change evokes and of how to manage those reactions provide the foundation for effective intervention.

Organizational change approaches and theories of change necessarily incorporate knowledge and theories in the individual, group, and organizational domains, developmental theories, the organization’s history, and change management theories and practice. Knowledge of work- place stressors and stress management techniques becomes particularly useful during change interventions. Positive approaches (e.g., those based on positive psychology

interventions, such as appreciative inquiry) are as important as those oriented to dysfunction. Organizational development interventions follow from organizational assessment or diagnosis and are designed in support of improving dysfunction or enhancing effectiveness. Halfhill et al. (2002) provide an instructive summary and examples of *Interventions that work (and some that don't)* in the organizational development and change domain.

Consultation Process Management

The OCP competencies listing will be an evolving set of recommendations that will likely continue to include knowledge and skill relevant for each consultation phase: contact and entry; contract formulation; problem identification and diagnostic analysis; goal setting and planning; action taking (intervention); and contract completion, continuity, and support. These service delivery and project management competencies are integral in brief as well as extended consultations. Additional education and training is important for those consulting psychologists who operate psychological consulting firms or departments within firms offering broader-range consulting services to businesses, industries, agencies, and organizations.

First and Last: Ethics

Ethical guidelines for consulting psychologists in general and organizational consulting psychologists in particular were introduced into the *Ethical Principles of Psychologists and Code of Conduct* in 2002 (APA, 2002). Further clarification came in 2010 when APA amended the Code's Introduction and Applicability section, as well as Ethical Standards 1.02 and 1.03 (APA, 2010). As noted previously, however, the Code's guidance is best applied with well-developed judgment and ethical decision-making. In OCP, a common challenge, for example, is clarifying how to proceed when personal values clash with perceived values of the individual or organizational client. This may come up initially in deciding whether to accept employment or

contract work with an organization. Or the question of what to do may arise in the course of providing service to a client, if one discovers a profound difference in values. Standard 1.03 deals with individual-organizational conflict and should be top of mind in such cases. It is suggested that, in addition to familiarity with the APA Code of Ethics, CPs/OCPs be familiar with models and processes for ethical decision-making (as referenced previously), engage in dialogue with a mentor consultant and/or regularly attend professional association gatherings to keep ethical competencies fresh and active.

CPs/OCPs also keep in mind that recommendations for ethical competencies associated with the practice of OCP are associated with eleven questions that permeate every consultation, and the answers infuse the services provided:

- Who is my primary client, and who encompass all stakeholder clients? The organization? The manager? The individual employee?
- What is my specific role? Am I and are other stakeholders clear on what my role includes and what it does not include?
- What are the parameters of confidentiality in the client's expectation? Are they acceptable to me?
- Are the goals of the organization and consulting contract congruent with my personal and professional values and ethics?
- What rights, power, and freedom does each individual participant in the consultation process have? Are these acceptable to me?
- How do I balance the task dimension and the human dimension of my work with this organization?

- What control do I have over the use and dissemination of information I gather as a consultant?
- What are the parameters of my accountability? Are they acceptable to me?
- Do I have the skills to be an effective and efficient consultant to this organization and for this concern?
- How do I integrate high professional and scientific standards with the need to operate cost effectively and profitably?
- How do I maintain objectivity and independence and avoid being used improperly by one faction of the organization?

Those engaged in organizational consulting psychology will face difficult and unexpected decisions, for example when they encounter behaviors and philosophies within an organization that are repugnant to them personally. Former SCP President Kenneth Bradt suggested that while all professions have codes of ethics and while heavy legal requirements speak to some issues, individual decisions often come down to very personal value judgments of right and wrong. Those in the behavioral sciences and especially the helping professions may confront them more often, perhaps in part because they are attuned to the broader social implications of their work.

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Section E: Appendices

E.1. 2005 SCP Guidelines for Education and Training at the Doctoral and Postdoctoral Level in Consulting Psychology (CP)/ Organizational Consulting Psychology (OCP) – *see attached*

E.2. Organizational Consulting Psychology Bibliography (includes but expands upon References in Section D)

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E.3. Ways to Learn About and Develop Skills in Consulting Psychology (See also the Society for Industrial and Organizational Psychology's (2016) *Guidelines for Education and Training in Industrial/Organizational Psychology*: siop.org/ETguidelines.aspx)

1. **Informational Interviewing/Exchanges:** A meeting in which a person seeks advice and information from an expert within their field or job of interest. These interviews are typically open-ended and driven by the person seeking the information, based on their personally developed questions, and expert input/guidance from the one interviewed. This method can be conducted via face-to-face contact or virtual mediums. Some examples include: Video chatting, phone chatting, and email. While General and Level-specific competency development does not occur this way, it can provide direction on where to go and how and what to learn.
2. **Independent Reading/Study:** Learning in which the person assumes basic responsibility for and commitment to the accomplishment of General and Level-specific competency development. It is a self-initiated effort is of central concern and for which such effort can successfully result in the development of competencies at least at the knowledge level. Skills are typically not developed this way, at least not to any level of proficiency. Examples would include individual efforts that target predetermined benchmarks through academic reading, proposals or technical reports, and designing and conducting research. This is a good method to stay current on profession and skill specific needs through

independent reading of Organizational Consulting Psychology, Industrial/Organizational Psychology and related professional publications.

3. **Formal Course Work:** Classroom instruction by a teacher on the Principles, General and Level-specific Competencies. Courses can be part of a degree program, stand-alone university course or official continuing education program. Courses can be taken in person, real time, or online – either real-time or asychronously (at one’s own time discretion relative to others in the course). Teaching methods can include lectures, case studies, projects, discussion, presentations, and other approaches. Learners can have the opportunity to work together with peers, taking advantage of the benefits of cooperative peer learning.
4. **Modeling/Observation/Job Shadowing:** Non-classroom implicit instruction that is obtained as a result of working with and paying attention to professionally qualified personnel in the daily conduct of their jobs or projects. This method implies that learning of important skills might well be achieved without explicit instructional intent on the part of the model being observed. Conversely, modeling may also be done in a purposeful and self-conscious manner. Modeling/ observation, because of its general nature, cuts across several of the above training methods. Observations can occur in person or by remote web camera or review of work done by professional others that is video recorded.
5. **On-the-Job-Training:** Field-based experience providing "hands-on" task learning under the direct guidance of a professionally qualified task expert. Such training is usually done simultaneously with one's job. Participation, unlike traineeships, involves compensation. Learners develop General and Level-specific Competencies “in vivo” – live in the context in which the tasks occur. From a social-learning perspective, mastery

of skills and knowledge can be best acquired this way, assuming a base level to perform the tasks.

6. **Project Work:** Individual or group-based work, either classroom or non-classroom based, in which the learner is actively engaged in assignments related to the field. These projects can vary in length and grant the learner real-world professional experience. Projects are designed to portray the knowledge, skills, and abilities that are being learned by the person through educational and other settings. Traditionally, these projects are supervised by teaching faculty, qualified mentors, and learning-minded bosses/supervisors at work. Professional associations often engage members in project work both as a method of getting work done and as a developmental opportunity for the volunteering or compensated member.
7. **Traineeships:** Organized and systematic program of learning provided by credentialed professionals in real world work settings. Supervised fieldwork as a trainee/intern should be a required and integral part of graduate training in Consulting Psychology in order to prepare them for practice in the field (Blanton, 2014). For example, Shoenfelt (2003) provides a checklist to facilitate successful experiences in applied projects that are incorporated into I-O psychology graduate training. Traineeships require meaningful professional supervision of the training experience (Byrne et al., 2014). Examples would include practicum and internship experiences, field-work teaching/training, thesis/dissertation research, etc. Participation is not motivated primarily by compensation. The training program should be responsive to the Graduate Program expectations of knowledge and skills taught to the student trainee. In order to assure a quality experience for students, faculty and administration should have clear criteria for vetting their supervision sites and for the qualifications of the direct supervision. A number of highly

effective programs have methods of linking the academic and fieldwork in a way that enriches both types of learning. Providing opportunities for collaborative work between program faculty and students and/or among students of various experience levels is seen as an effective practice.

8. **Supervision/Mentoring:** Individualized course of learning, guidance and support between and individual (sometimes a group) and a credentialed professional or team of professionals. This is an important element of a well-run traineeship. It is often done as a stand-alone method by students, early career and even experienced Consulting/Organizational psychologists – to achieve improvements in the General and Level-specific Competencies and to evolve personally and professionally in more holistic ways. Supervisors and mentors serve not only as skills coaches but also as career guides, professional references, and sometimes counselors to those they are working with.
9. **Licensing:** This is based on the State in which one works in the United States – where one officially “offices,” and also takes into account where one delivers significant amounts of work. The licensing bodies in the United States are the state boards of psychology, which should be contacted for details regarding their specific licensing requirements. Many countries around the world also have their own licensing processes. This is a distinct way to demonstrate competency to the public, hold oneself accountable to that and commit to a life-long path of Continuing Education. There are limitations of current State-based and Country-based licensing. Significant efforts are underway toward state compacts, portability and interstate/multistate agreements in psychology and many other professions, to facilitate work across state lines. Ultimately, Consulting Psychology is in need of a licensing/credentialing tool that reflects the global nature of where Consulting

Psychologists base their practices and where they deliver services.