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4 **GUIDELINES FOR EDUCATION AND TRAINING**
5 **AT THE DOCTORAL AND POSTDOCTORAL LEVEL IN**
6 **CONSULTING PSYCHOLOGY/ORGANIZATIONAL CONSULTING PSYCHOLOGY**
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14 **Prepared for the**
15 **Society of Consulting Psychology (SCP)**
16 **Division 13 of the American Psychological Association**

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40
41
42
43
44
45
46

TABLE OF CONTENTS

Section A. Introduction

A.1. Terminology

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

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

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

A.2.(a). Scope of application

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

A.3. Process of developing proposed guidelines

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

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

Section B: Implementation and Maintenance of Proposed Guidelines

B.1. Plan for promulgating proposed guidelines

B.2. Plan for maintaining currency of guidelines

Section C: Content of Proposed Guidelines

C.1. Clarity and internal consistency of text

C.2. Validity of guidelines

C.3. Individual and cultural diversity issues

C. 4. *Guidelines For Education And Training at the Doctoral and Postdoctoral Level*

in Consulting Psychology (CP) / Organizational Consulting Psychology (OCP)

Section D: References

47 **Section E: Appendices**

48 **E.1. Brief Background Information: Writers/ Contributors to CP/OCP Guidelines**

49 **E.2. 1997/8 CP/OCP Guidelines Planning Grid**

50 **E.3. SCP CP/OCP Guidelines Development History**

51 **E. 4. Brief Reviews of Invited Feedback from APA Divisions**

52 **E.5. Overview of CP/OCP Guidelines: Principles, General Competencies,**

53 **Domain Specific Competencies**

54 **E. 6. Most Influence on 20th Century Consulting Psychology, p.1. SCP 1999-2000**

55 **Survey**

56 **E.7. International Organizational Consulting Process (IOCP). A Calibration**

57 **Consultation Model for Proactive Attention to Clients, suggested for**

58 **Proactive Multicultural and International Intervention**

59

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61 **AT THE DOCTORAL AND POSTDOCTORAL LEVEL**
62 **IN**
63 **CONSULTING PSYCHOLOGY (CP) /ORGANIZATIONAL CONSULTING**
64 **PSYCHOLOGY (OCP)**

65
66 **Prepared for the**
67 **Society for Consulting Psychology (SCP)**
68 **Division 13 of the American Psychological Association (APA13)**

69 *2004 Version*

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73 **Section A. Introduction**

74 The purpose of these guidelines is to provide a common framework for use in the
75 development, evaluation, and review of education and training in consulting psychology (CP)
76 with particular focus on organizational consulting psychology (OCP). The intent of doing this is
77 to improve the quality of teaching and learning in the emerging area of practice in CP/OCP
78 within the scientific discipline and profession of psychology. Towards these ends, this document
79 is intended as guidance for psychologists who teach or plan curricula for teaching CP/OCP at
80 doctoral or postdoctoral levels of professional education and training in psychology.

81 These guidelines will be updated within ten years of the date initially approved by the American
82 Psychological Association (APA) in accordance with provisions of Association Rule 30-8.3 and

83 in alignment with the governance coordinating responsibilities and review managed by the
84 Board of Educational Affairs (BEA) (2004, *Developing and Evaluating Standards and*
85 *Guidelines Related to Education and Training in Psychology: Context, Procedures, Criteria, and*
86 *Format*).

87 **A.1. Terminology**

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

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

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

98 Guidelines is the appropriate term of choice for aspirational recommendations in regard
99 to curriculum development, learning objectives, and teaching strategies to those responsible for
100 graduate and postdoctoral education and training in psychology. Although ultimate
101 responsibility for matters of curriculum development and pedagogy is that of the faculty in
102 higher education institutions and programs, the involvement of national regulatory and
103 disciplinary associations in developing and promulgating guidelines related to professional
104 development is recognized, especially for new or changing areas of practice. CP/OCP is such an
105 area in the practice of psychology.

106 **A.2. Scope of application and need for proposed guidelines**

107 **A.2.(a). Scope of application**

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

117 This initial mapping of CP/OCP is intentionally a broad, general outline of three relevant
118 areas of competency for OCP practice, the Individual (I), Group (G), and Organizational (O).
119 The IGO competencies are placed within the framework of competency requirements recognized
120 as important for doctoral level education and training in psychology. Following endorsement of
121 this first articulation, the intention is to extend the competency map to include suggestions for
122 psychologists at the several stages of their career in OCP: beginning, entry/transition, midlevel,
123 and senior. This OCP document serves as the model for developing additional guideline
124 documents that will be tailored for psychologists whose consulting is based on expertise in
125 particular specialties and public interest fields, such as mental health, forensic, sports, aids,
126 diversity, environmental impact and life span.

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

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

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

150 continuing education (CE) programs in professional psychology (Hellkamp & Garmon, 1998;
151 O’Roark, 1999).

152 While there are doctoral and postdoctoral education and training courses on consultation
153 in a few universities (Hellkamp, Zins, Ferguson, & Hodge, 1998; Munz, 1977)), there exist no
154 other guidelines that address the three-domain competency model considered central in CP/OCP
155 guidelines. The domain infrastructure for OCP addresses competencies focused on *individual*,
156 *group*, and *organizational/systems (I-G-O)* levels. The uniqueness of this feature of the OCP
157 guidelines was validated when SCP invited four closely aligned divisions to write articles
158 providing comparative analysis, critiques, and feedback on the OCP guidelines for publication in
159 a special issue of the *Consulting Psychology Journal: Practice and Research* (Cooper, 2002).
160 These articles, summarized in Appendix E.4, were invited by the journal’s guest editor following
161 completion of the formal call for comment on an earlier draft of the guidelines, issued by BEA to
162 APA governance groups, divisions, legal counsel, and other interested/affected parties.

163 In summary, OCP guidelines were developed in response to perceived need based on
164 three types of evidence: an increase of interest among psychologists in CP/OCP without a
165 corresponding growth in education and training programs focused on that area of practice; an
166 increase of literature in recent years distinctive to the practice of CP and, especially, OCP that
167 needed to be synthesized; and, a growing consensus of professional support for the three-domain
168 competency model for preparation to practice CP/OCP (E.4). It is anticipated that consulting
169 competencies relevant, for example, for a mental health or school psychologist will include
170 knowledge and skills pertinent to each I-G-O domain, but will not include all competencies
171 named for OCP practitioners.

172 **A.3. Process of developing proposed guidelines**

173 The Society of Consulting Psychology (SCP) is responsible for developing these
174 guidelines. Prompted by the increased interest in CP/OCP practice, SCP in 1997 called together
175 an Education and Training (E&T) *ad hoc* work group of selected division members with
176 recognized experience and expertise backgrounds to undertake the task of developing and
177 writing guidelines for education and training at the doctoral and postdoctoral level in consulting
178 psychology/ organizational consulting psychology (CP/OCP). Towards that end, this document
179 is the result of iterative drafts [1999 – 2004] that have been periodically distributed for comment
180 and feedback from SCP members, APA divisions and governance groups, and non-APA
181 colleagues.

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

183 Participants.

184 The eight E & T Committee members who contributed substantively to the development
185 of the CP/OCP guidelines are: Rodney L. Lowman (E&T Chair, 1998-2000), Clayton Alderfer,
186 Michael Atella, Andrew Garman, David Hellkamp, Richard Kilburg, Paul Lloyd, Ann O'Roark,
187 and Stewart Cooper (E&T Chair, 2000-2004). They represent different aspects of CP/OCP
188 practice, a nation-wide distribution, and individuals recognized as having expertise and
189 experience in substantive content components. Brief reviews of their professional backgrounds
190 are provided in Appendix E.1. and their substantive assignments are shown in Appendix E.2.

191 During the 1998 Midwinter Conference and Board Meeting, division leaders identified
192 members with publication and experience background in the several guidelines domains. These
193 individuals were invited to become part of the special E&T task group to draft guidelines. A pool
194 of individuals interested in the E&T exploration of consulting proficiencies had initially been
195 developed by inviting conference attendees with background and time to devote to the E&T

196 work to put their names on chart paper sheets [with topical labels] that were placed on meeting
197 room walls during the 1996 and 1997 Midwinter Conferences (DeWayne Kurpius, E&T Chair,
198 1995-98, Appendix E.3).

199 The geographic regions represent programmatically diverse academic approaches to
200 organizational consulting: East-Rutgers; Central–Xavier and Southeast Missouri State
201 University; South-Eckerd College/Leadership Development Institute [Center for Creative
202 Leadership] programs; West-Alliant International University. External and Internal Consulting
203 was represented: (a) a full time independent practitioner, two part-time private practitioners, and
204 (b) two full time employees -- a government agency, and a hospital system. An award winning
205 postdoctoral intern represented early career psychologists in consulting psychology.

206 The work of this E&T work group was informed by surveys of CP/OCP practice
207 conducted by SCP leaders during the previous decade (Hellkamp, D. T. & Morgan, L., 1990;
208 Hellkamp, D.T., 1993; Robinson-Kurpius, Fuqua, Gibson, Kurpius, & Froehle, 1995). After
209 analyzing survey results and reviewing recent literature, academic programs, and other division
210 policies, the writers adopted the framework for the present guidelines for CP/OCP, consisting of:
211 (a) overarching principles; (b) general competency domains; and (c) domain-specific
212 competencies for the three-domain model for CP/OCP that focuses on individuals, groups, and
213 organizations/systems. Appendix E.2 shows the plan for guidelines development with
214 committee member assignments to different aspects of the guidelines with initial time-line
215 projections and objectives.

216 Process.

217 Appendix E.3 presents a long view of division activities that were preliminaries to the
218 current guidelines development process. During the division’s 1998 Midwinter Conference the

219 E&T writing group drafted objectives and steps for development of CP/OCP education and
220 training guidelines. The *ad hoc* writing group established the final planning model and
221 organizing framework during a conference call the following month. Subsequently, authors sent
222 materials to the E&T chair for editorial suggestions and for integration of the several sections.
223 Based on editorial comments received a revised preliminary draft of the guidelines was
224 disseminated to the midwinter SCP Board. Subsequent to that, two SCP symposia were
225 conducted during the 1999 APA summer convention, offering forums for considering the need
226 for OCP guidelines. They were framed around the following two themes: (1) *Do We Need*
227 *Doctoral Level Programs In CP/OCP*, and (2) *Similarities And Differences Among Four*
228 *Doctoral Level Psychology Programs Offering Concentration In Organizational Consulting*.

229 In the Fall of 1999, the first draft was submitted via APA Division Services to the APA
230 Board of Educational Affairs (BEA). In January of 2000 during its midwinter meeting, the SCP
231 Board conducted a two-hour review of the Fall 1999 guidelines draft submitted to BEA.
232 Following those early efforts, several iterations of the guidelines were drafted in response to
233 feedback and suggestions.

234 Substantive feedback received from outside SCP at that time came from APA divisions,
235 notably Divisions 14 and 52. In order to supplement and extend the feedback data base, SCP
236 published a special issue of its division journal, *Consulting Psychology Journal: Practice &*
237 *Research (CPJ:P&R)(2000)*. Invited formal reviews of the guidelines came from four APA
238 divisions with larger overlap memberships (Divisions 14, 16, 17, and 19), abstracts of which
239 appear in Appendix E.4. Although each of the articles offers a different perspective and
240 emphasis related to particular competencies in organizational consulting, all included strong
241 commendations for the SCP guidelines effort, expressing support for articulating and

242 promulgating the guidelines. A few of the more complex recommendations made in the articles
243 are under consideration by SCP for inclusion in its next articulation of these guidelines.

244 Other opportunities for review-and-feedback on the draft guidelines include: the SCP
245 website and the division initiated *Handbook of organizational consulting psychology: A*
246 *comprehensive guide to theory, skills, and techniques* (Lowman, 2002). Since 1997, the *CPJ:*
247 *P&R* devoted two full issues to training and education in OCP (by Guest Eds. Hellkamp &
248 Garman, 1998:50,4; and by Guest Ed. S. Cooper, 2002:54,4). In *CPJ: P&R*, 55,2, 2003,
249 Lowman included the SCP experience as a case example as he reviewed the article, “History and
250 political process of professional training and practice guideline promulgation and approval.”

251 In their review, the BEA had deferred action on CP/OCP guidelines, pending completion
252 of its development of formal procedures and criteria by which to evaluate guidelines for
253 education and training in psychology, undergoing a process similar to one just completed by
254 BPA for practice guidelines. In the same time period, BPA cleared their expressed concerns
255 regarding SCP guidelines as submitted in 1999/2000 and referred them to BEA for primary
256 processing. Since the guidelines met extant criteria and were cleared to proceed, SCP submitted
257 a new business item to the APA Council of Representatives in February 2001, seeking Council
258 endorsement of the CP/OCP guidelines. SCP’s January 4, 2001 main motion reads:

259 *“That the Council of Representatives approves Division 13 [SCP] promulgating*
260 *the “Guidelines for Education and Training at the Doctoral and Postdoctoral*
261 *Level in Consulting Psychology-Organizational Consulting Psychology as*
262 *division policy, making it clear that the division is not speaking for the APA or for*
263 *any other division or unit of APA”.* (P. J. Lloyd, APA13 Council Representative,
264 1997-2003, received 48 endorsements from fellow Council Representatives).

265 Council declined to take action pending development of BEA procedures and criteria for
266 the review of such documents. The item remains as new business “pending” before the Council.
267 With the Council’s approval in February 2004 of the procedures and criteria for evaluating
268 education and training guidelines developed by BEA, SCP is now requesting again that the OCP
269 guidelines be reviewed by BEA in the context of its criteria and procedures for adoption of
270 education and training guidelines and standards, and forwarded to the Council of Representatives
271 for its approval in February 2005.

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

273 The following documents provided foundations, baseline, and substantive information for
274 preparing the SCP/OCP guidelines.

275 Policy Documents Relevant for Guideline Development

276 *Association Rules of the American Psychological Association* (APA, 2004). This
277 document has been revised since the initial drafting of the CP/OCP guidelines. Rule 80.3
278 provided parameters and expectations followed in development of the CP/OCP guidelines, i.e.
279 the stipulated ten year time frame for updating and renewal of guidelines.

280 *Developing and Evaluating Standards and Guidelines Related to Education and Training*
281 *in Psychology: Context, Procedures, Criteria, and Format* (APA/BEA, 2004). This policy
282 served as the formatting guideline for this 2004 re-alignment of 2001 OCP guidelines that had
283 been developed over three years. Consistency in language, such as elimination of all “should”
284 words, and assurance of articulated attention to each domain [individual, group,
285 organizational/system] to ethical, diversity, multicultural, life span, social-cultural issues, and
286 legal considerations.

287 *American Psychological Association ASME Guidelines*, (APA, 1992). This APA policy, gave
288 pertinent, constraining details relevant for articulating guidelines that might affect economic
289 interests or competition in the general public arena. Distinguishing between OCP and
290 management consultants without credentials in psychology becomes increasingly important for
291 those practicing OCP and required specific attention to these legal risks. This policy emphasizes
292 the need to obtain and consider views of all who will be affected by the guidelines, gathering
293 consensus opinions, and maintaining documentation of circulation of guidelines (See general
294 competencies, section 10).

295 Policy Documents Relevant For Substantive Components

296 *Ethical Principles of Psychologists and Code of Conduct* (APA, 2002). This policy was
297 revised since the initial drafting of OCP guidelines. Preparing CP/OCP guidelines brought to
298 attention of the SCP leadership group an absence of APA ethics statements relevant to the unique
299 aspects of consulting psychology. As a result the SCP board set up an ad hoc work group to
300 collaborate with the APA committee updating the APA ethics code. Professional Ethics are
301 included in the OCP guidelines model as a separate and specific general competency, are
302 relevant and permeate each of the three domains of interventions, and are re-addressed as the
303 concluding section of the OCP guidelines. Particular references are made in several sections, for
304 example: Standard 2: Competence (General Principles, Assessment, paragraph 2); Standard 4:
305 Privacy and Confidentiality (Individual Domain, paragraph 7); and, Standard 9: Assessment
306 (Individual Domain, paragraph 2,4,5).

307 *Guidelines On Multicultural Education, Training, Research, Practice, and*
308 *Organizational Change For Psychologists* (APA, 2003). This document was published after the
309 OCP guidelines were initially prepared and presented to APA Council and will serve as a major

310 resource for future updating work on these guidelines. Guideline #5: “Psychologists strive to
311 apply culturally-appropriate skills in clinical and other applied psychological practices” (p.309-
312 392) and Guideline # 6 “Psychologists are encouraged to use organizational change processes to
313 support culturally informed organizational (policy) development and practices” are of particular
314 importance, especially the education and training aspects.

315 Several SCP/Division 13 activities and key interests of members afford evidence that
316 diversity [multicultural, international] issues have received prominent attention in division
317 efforts to consolidate knowledge and literature relevant to consulting practice. SCP has
318 maintained an ongoing interest in international considerations since the 1950s, offers
319 international symposia as part of their APA convention program on a regular basis, publishes
320 multicultural articles in it’s journal, the board has stated a diversity goal since 1990, and included
321 several chapters in the recently published handbook on organizational consulting psychology.
322 One chapter includes a consulting model designed for proactive attention to cultural differences
323 before attempting any organizational intervention (O’Roark, 2002).

324 The APA multicultural guidelines document includes an extensive reference list that
325 extend and supplement references recorded in these OCP guidelines and those in the
326 international and cross cultural chapters of the SCP 2002 *Handbook on Organizational*
327 *Consulting Psychology: Theory, Skills, and Techniques* (2002. esp. Cooper & Mullin; Nurcan; &
328 O’Roark).

329 *Guidelines for Psychotherapy with Lesbian, Gay, and Bisexual Clients* (2000) is an APA
330 approved set of practice guidelines that incorporate an educational component. This document
331 and the APA Multicultural Guidelines (2003) provide examples of educational components that

332 will inform the updating OCP guidelines, developed prior to publication of either APA policy
333 document.

334 *Guidelines for Education and Training at the Doctoral Level in Industrial/Organizational*
335 *Psychology* (SIOP, 1998); and, *Principles for the Validation and Use of Personnel Selection*
336 *Procedures, 4th Edition* (SIOP, 2003). The 1985 I/O guidelines were reviewed and discussed by
337 the SCP guidelines writers prior to initial draft preparations. The 2003 updated principles will be
338 a model for updating OCP guidelines. The overlaps between CP/OCP are numerous and noted by
339 the SIOP review of the guidelines in Appendix E.4. The envisioned expansion of CP guidelines
340 to address consultation education and training in clinical, counseling, and school psychology will
341 reflect similar overlaps with guidelines developed for those fields and are noted by other
342 division’s reviewers summarized in E.4.

343 **Section B: Implementation and Maintenance of Proposed Guidelines**

344 Implementation and maintenance of the proposed guidelines is assigned to the Education
345 and Training (E&T) Committee of the Society of Consulting Psychology (SCP)/APA Division
346 13.

347 **B.1. Plan for promulgating proposed guidelines**

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

355 **B.2. Plan for maintaining currency of guidelines**

356 The SCP E&T Committee will plan for the review and update the proposed guidelines on
357 a regular basis. No later than five years after APA approval of the proposed guidelines, the SCP
358 E&T chair will present a schedule for updating, including recommendations for an *ad hoc* review
359 committee, a time-table for presenting an updated draft to the SCP Board for review, to the
360 division APA Council Representative, and to the APA Board of Educational Affairs for APA
361 governance reviews prior to APA Council re-endorsement in time for the update required by
362 Association Rule 80.3. A second E&T ad hoc workgroup, appointed in 2001, articulated OCP
363 guidelines as a division white paper document that elaborates skills associated with consulting
364 career phases: Beginning Level (0-3 experience, first career choice); Entry Level (0-3 years
365 experience in some field not considered organizational psychology); Mid-Level (4-7 years
366 experience); and Senior Level (8+ years experience in OCP). The division Professional Affairs
367 Committee articulated a division policy regarding licensure issues. An expansion of consulting
368 guidelines for psychologists specialized in mental health, forensic, school, sports, multicultural,
369 and international issues is awaiting completion of the OCP prototype.

370 **Section C: Content of Proposed Guidelines**

371 In preparing the current guidelines, the SCP E&T Committee has been sensitive to the
372 evaluation criteria established by the BEA for review of standards and guidelines for education
373 and training in psychology, namely: clarity and internal consistency of text; validity of
374 guidelines; and issues of individual and cultural diversity.

375 **C.1 Clarity and internal consistency of text**

376 The review process has improved clarity and internal consistency of the SCP Guidelines
377 for Education and Training at the Doctoral and Postdoctoral level in Consulting

378 Psychology/Organizational Consulting Psychology. Careful attention to terminology has been
379 given in reviews so as to be consistent with APA policy guidance on such matters. Eight
380 iterations of the initial draft guidelines have been completed. A chart of the guidelines model
381 was introduced. All key terms were defined and any language implying “should” or “must” was
382 replaced.

383 **C.2. Validity of guidelines**

384 Validity for the proposed guidelines is documented through references listed in this
385 document and, more extensively, in literature cited in the 32 chapters of the *Handbook of*
386 *Organizational Consulting Psychology: A Comprehensive Guide to Theory, Skills, and*
387 *Techniques*, conceptualized by the SCP Board and the E&T Committee, edited by Rodney
388 Lowman, and published by Jossey-Bass (2002).

389 **C.3. Individual and cultural diversity issues**

390 Identity-group research and interventions are prominent features in the group domain
391 section. Diversity and international issues are included in the OCP model as a General
392 Competency. A proactive model, *calibration consultation*, for international organizational
393 consulting is provided in Chapter 21 of the *Handbook of Organizational Consulting Psychology*
394 (O’Roark, 2002), and incorporates most of the competencies described in this document.

395 **C.4 Guidelines for Education and Training at the Doctoral and Postdoctoral Level in** 396 **Consulting Psychology (CP) /Organizational Consulting Psychology (OCP).**

397 The substance of the guidelines follows.

398 Guidelines for Education and Training at the Doctoral and Postdoctoral Level
399 in Consulting Psychology (CP)/Organizational Consulting Psychology (OCP) (2004).

400 Society for Consulting Psychology (SCP) / Division 13
401 American Psychological Association (APA).

402 **Purpose of the Guidelines**

403 The purpose of these guidelines is to provide a common framework for use in the
404 development, evaluation, and review of education and training in consulting psychology /
405 organizational consulting psychology (CP/OCP). The intent of these guidelines is to improve the
406 quality of teaching and learning in the area of the practice of CP, especially OCP within the
407 scientific discipline and profession of psychology.

408 Towards these ends, this document is intended as guidance for psychologists who teach
409 or plan curricula for teaching CP/OCP at doctoral or postdoctoral levels of professional
410 education and training in psychology. The guidelines are structured in the form of overarching
411 principles, general competencies, and domain specific competencies that are ideally obtained by
412 persons receiving training at the doctoral or postdoctoral level in CP/OCP. (Appendix E.5.)

413 Consulting Psychology, a practice that focuses on consultation to, with, for individuals
414 and organizations at individual, group, and organizational/systemwide levels rooted in multiple
415 areas of substantive expertise, is used here as defined in the 1999 SCP Bylaws:

416 *Consulting psychology, for the purposes of these By-Laws, shall be defined as the*
417 *function of applying and extending the special knowledge of a psychologist,*
418 *through the process of consultation, to problems involving human behavior in*
419 *various areas. A consulting psychologist shall be defined as a psychologist who*
420 *provides specialized technical assistance to individuals or organizations in*

421 *regard to the psychological aspects of their work. Such assistance is advisory in*
422 *nature and the consultant has no direct responsibility for its acceptance.*

423 *Consulting psychologists may have as clients individuals, institutions, agencies,*
424 *corporations or other kinds of organizations. (www.apa.org/divisions/div13/)*

425 Also relevant to these guidelines is the general definition of psychological practice noted in
426 *Model Acts of the American Psychological Association (1987) and the Association of State and*
427 *Provincial Psychology Boards (1992). Practice of Psychology is defined (ASPPB, 1992, pp. 4-*
428 *5) as:*

429 *the observation, description, evaluation, interpretation, and/or modification of*
430 *human behavior by the application of psychological principles, methods, or*
431 *procedures, for the purpose of preventing or eliminating symptomatic,*
432 *maladaptive, or undesired behavior and or enhancing interpersonal relationships,*
433 *work and life adjustment, personal effectiveness, behavioral health and mental*
434 *health. The practice of psychology includes, but is not limited to, psychological*
435 *testing and the evaluation or assessment of personal characteristics, such as*
436 *intelligence, personality, abilities, interests, aptitudes, and neuropsychological*
437 *functioning; counseling, psychoanalysis, psychotherapy, hypnosis, biofeedback,*
438 *and behavior analysis and therapy; diagnosis and treatment of mental and*
439 *emotional disorder or disability, alcoholism and substance abuse, disorders of*
440 *habit or conduct, as well as psycho educational evaluation, therapy, remediation,*
441 *and consultation. Psychological services may be rendered to individuals,*
442 *families, groups, organizations, institutions and the public. The practice of*
443 *psychology shall be construed within the meaning of this definition without*

444 *regard to whether payment is received for services rendered [certain exemptions*
445 *are noted, e.g., for teaching and research].*

446 **Working Model and Assumption of the Principles**

447 Areas of Training Addressed. This document proceeds from three overarching
448 principles and ten general areas of learning competencies, culminating in competencies specific
449 to three domains or levels of organizational consulting psychology: *individual, group, and*
450 *organization / systemwide /intersystem (I-G-O)(E.5)*. Although there are other applications of CP
451 for which alternative or additional competencies may be relevant (e.g., health-related CP), the
452 specific areas of expertise addressed in this document relate to CP as it is applied to
453 organizational consulting psychology (OCP). These guidelines are not intended to replace, usurp,
454 or conflict with training policies or principles that have been developed and approved for other
455 areas of practice such as those in I/O, clinical, counseling, or school psychology.

456 CP/OCP guidelines note that the effective practice of CP/OCP, ideally, draws
457 simultaneously on general competencies applicable in every domain, for example: recommended
458 adherence to the scientist-practitioner model; recognition of the evolving nature of the field;
459 acknowledging the multiple avenues for preparation for various roles as a CP; encouraging self
460 awareness and self-management; relationship development; assessment competency; process
461 consultation; interventions and methodological diversities required to meet contextual
462 uniqueness; knowledge of theory, case studies, empirical research; application of
463 multicultural/international competencies; research methods and statistics; technological
464 advances, business operations, industry regulations, legal considerations; and advocating
465 knowledge of and adherence to ethical and legal parameters.

466 Appendix E.5. provides an overview map of the CP/OCP Guidelines. OCP guidelines
467 include three overarching principles, the assumptions and premises of the guidelines; ten general
468 competency areas, the foundations common to applied psychology and included here to show the
469 context of the OCP competencies; and, three domains of specific competencies – Individual,
470 Group, and Organizational & Systems (I-G-O), consolidated here to explicate competencies
471 unique to OCP. The focus and task of this document is to address the Domain Specific
472 Competencies, I-G-O competencies uniquely relevant to organizational consulting psychology.

473 Overarching Principles. The overarching principles are the acknowledged assumptions
474 and psychological context within which the OCP competencies are framed. They are: 1)
475 Scientist-practitioner; 2) Evolving field; and 3) Non-exclusivity.

476 General Competencies. The ten general competencies as detailed and promulgated by
477 APA specialists in those topics show the psychological context within which the OCP
478 competencies function. They are: 1) Self-awareness & Self-management; 2) Relationship
479 Development; 3) Assessment; 4) Process Consultation/Action Research; 5) Interventions; 6)
480 Knowledge Of Theory, Case Studies, Empirical Research, Applications, Evaluation Methods, 7)
481 Multicultural and International Awareness, Knowledge of Socio-Political Background and
482 Cultural Values and Patterns; 8) Research Methods and Statistics; 9) Business Operations, Legal,
483 Industry Regulations, Technological Advances; and, 10) Professional Ethics And Standards.

484 Domain Specific Competencies. The OCP guidelines address attention to I-G-O
485 competencies pertinent to the work of consulting: 1) Individual Level/Domain Interventions; 2)
486 Group Level/Domain Interventions; and, 3) Organization/Systems Level/domain Interventions.

487 The three overarching principles are understood and used here as follows:

488 **Overarching Principles**

489 Principle 1: Scientist-Practitioner Assumptions.

490 Consistent with the orientation of SCP/ Division 13 of APA, these guidelines assume that
491 CP/OCP is guided by the science of psychology in evaluating and assessing the effectiveness of
492 interventions and assessment methodologies used in the practice of OCP. The use of the term
493 *interventions* here is consistent with Daugherty, 2000, who defines *interventions* as:

494 “. . .*activities the consultant and consultee think have the best chance of*
495 *effectively solving the problem.*”

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

503 No single model of empirical research, however, is assumed to have a monopoly on truth
504 by the endorsement of the "scientist-practitioner" model of consultation. CP/OCP trainees learn,
505 e.g., not just about research methodologies but also about the role of the consultant as an active
506 participant in the consulting process at hand (Lippitt & Lippitt, 1978). Action research, an
507 assessment or study of the situation and problem undertaken by the consultant prior to the
508 implementation of particular consultation services or interventions, is traced to Kurt Lewin
509 (1951). An example of such practice in OCP is the joint consultant-client determination of an
510 organizations' needs or critical problems and ideal outcomes, sometimes called *calibration*

511 *consultation*, a process that is important when applying complex constructs to practical problems
512 (Schein, 1985), especially in international or multicultural organizations (O’Roark, 2002).

513 Principle 2: Evolving Field.

514 CP and OCP have evolved over time. The body of knowledge and methods of service
515 delivery escalated in the past two decades, stimulated by the writings and publications of former
516 SCP President, Thomas Backer (1982a, b). DeWayne Kurpius, 1991 winner of SCP/APA13’s
517 award for outstanding consulting service to organizations, prepared a consulting psychology
518 reading-list for a survey conducted while he was E & T chair for SCP. Results of a 1999 SCP
519 survey (E.6) of “the best of the century” in consulting psychology reports names of psychologists
520 with greatest influence on contemporary consulting psychologists, as well as listing 68 authors
521 and 93 titles (O’Roark, 2000). Top rated writings in APA Division 13’s millennium survey were
522 similar to the earlier Kurpius survey: *Organizational Diagnosis* (Levinson, 1972); *Process*
523 *Consultation* (Schein, 1969); *Intervention Theory and Methods* (Argyris, 1970); and, *The Theory*
524 *and Practice of Mental Health Consultation* (Caplan, 1970). Carl Rogers is cited six times.
525 Three of these nominations are for his book, *Freedom to Learn* (1969). Edgar Schein received
526 four citations, two for his book, *Organization Culture and Leadership* (1985 & 1992) and two
527 for *Process Consultation* (1969). Other top rated writings are: Block (1981); Caplan and Caplan
528 (1993); Lippitt and Lippitt (1978); Senge (1990); and Tobias (1990).

529 As a relatively new area, OCP will continue to evolve, and sometimes to use techniques
530 that have received limited research investigation. The concern is to do so in an ethical manner.
531 Standard 2.e of the 2002 *Ethical Principles of Psychologists and code of Conduct* (2002) was
532 specifically written to provide guidance. It states “(e) **In those emerging areas in which**
533 **generally recognized standards for preparatory training do not yet exist, psychologists**

534 **nevertheless take reasonable steps to ensure the competence of their work and to protect**
535 **clients/patients, students, supervisees, research participants, organizational clients, and**
536 **others from harm.”** This standard is highlighted in regularly offered Ethics Workshops
537 sponsored by SCP and is also attended to in articles published in the Division’s two official
538 publications, *Consulting Psychology: Practice and Research*, and the *Consulting Psychologist –a*
539 *newsletter*.

540 Principle 3: Non-Exclusivity. OCP guidelines recognize that there are appropriate ways
541 other than doctoral training in CP/OCP to become proficient in the competencies here described
542 (e.g. Foster, 2002. *Enhancing Peak Potential in Managers and Leaders: Integrating Knowledge*
543 *and Findings from Sport Psychology*). Academic training in areas such as
544 Industrial/Organizational Psychology (e.g., Society for Industrial and Organizational
545 Psychology, 1998) and Clinical or Counseling Psychology provide considerable training that is
546 relevant for the practice of CP. These guidelines are intended to assist in the specific
547 development of doctoral programs, postdoctoral training, and continuing education
548 institutes/workshops in CP/OCP.

549 OCP guidelines and references have been prepared to reflect the current state and
550 historical development of the OCP field, highlighting contributions of SCP/APA13 leaders, and
551 to provide a conceptual framework for the development of training programs. It is expected that
552 these OCP guidelines will continue to change over time to keep pace with advances in research
553 and practice.

554 **General Competencies**

555 OCP guidelines comprise sets of competencies needed for CP practice in work and
556 organizational contexts. The document intentionally identifies *recommended competencies* (or

557 "end states") rather than presenting "model curricula" or specific course work since there are
558 multiple ways to obtain the desired competencies. Indeed, innovation in doctoral and
559 postdoctoral training methodologies for helping students achieve these competencies is
560 encouraged.

561 General Competencies are included here to place in context the targeted CP/OCP
562 competencies emphasized in this document for the doctoral-level consulting psychologist.

563 General Competency areas are briefly touched upon here, some more fully than others
564 due to suggestions provided during review of the document by APA divisions,
565 state/province/territorial groups, APA boards and committees, and others invited to provide
566 feedback. In addition to feedback provided in 1999/2000, noted elsewhere (Divisions 14, 16, 17,
567 19, and 52), the guidelines writers of the 2004 version express appreciation to those providing
568 suggestions and comments during 2004 to earlier iterations promulgated: Division 38, Health
569 Psychology; Division 44, Study of Gay, Lesbian, and Bisexual Issues; Division 14,
570 Industrial/Organizational; Division 17, Counseling; Division 42, Independent Practice; APA
571 Committee on Women in Psychology; APA Committee on Aging; APA Policy and Planning
572 Board; APA Committee on the Advancement of Professional Practice; APA Board of
573 Professional Affairs; APA Board for the Advancement of Psychology in the Public Interest;
574 APA Board of Scientific Affairs; APA Committee on Legal Issues; and, the Board of
575 Educational Affairs. Of 48 specific suggestions, 33 were directly addressed in the December
576 2004 draft; and, 5 matters requiring more research are being referred to the Division 13
577 Education and Training Committee for consideration for the next update.

578 Two general competency areas, Self Awareness / Self Management and Relationship
579 Development are prerequisites for all areas of psychological practice. Graduate level education,

580 practicum, or internship work pertinent to these competencies ideally include close critiquing of
581 personal value and belief systems as well as analysis of interpersonal exchanges with colleagues
582 and clients. Self-Awareness and Relationships Development competencies apply in each of the
583 I-G-O domains of consulting services. Psychologists learn how to build constructive,
584 *collaborative relationships* with a variety of types of people and organizational representatives.
585 They learn how to maintain both objectivity and personal engagement as they work with clients
586 to further specific consultative goals.

587 Assessment. *Assessment* is considered to be not only a General Competency, but also a
588 pivotal CP/OCP competency in all three I-G-O consulting levels. It is given special attention
589 here as a general competency to begin to highlight the aspects distinctive to OCP. Ryan and
590 Zeran (1972) usefully defined assessment as:

591 *“a disciplined way of analyzing as precisely as possible an existing situation by*
592 *determining the nature of the elements which combine and relate to make the*
593 *situation what it is, establishing interrelationships among the elements, and*
594 *synthesizing a new whole to provide means of optimizing system outcomes.”*

595 Assessment competencies for organizational consulting can be depicted on dual continua:
596 scientist- practitioner and theory to practice. While assessment approaches, methods, and
597 instruments vary dramatically according to the I-G-O domain of focus and cultural context, skills
598 to be developed in assessment, regardless of I-G-O focus, include identifying (observing, using
599 logical deduction), integrating (classifying), and inferring (matching evidence to goals and
600 assessment schema), in order to assist in decision making, in implementing change, or in
601 improving understanding (Barclay, 1991). Assessment, generically, is the systematic process of
602 making inferences in order to arrive at a diagnosis for use in informed decision-making regarding

603 interventions. Special attention to and need for assessment in preparation to work with
604 multicultural groups and international organizations is highlighted and defined in the “calibration
605 consultation” model (O’Roark, 1995; 2005).

606 The pervasive aspect of competence (Ethical Principles of Psychologists and Code of
607 Conduct 2002; Standard 2) in systematic, formal assessment, across the three interactive domains
608 – I-G-O -- is recognized by representing psychological assessment as a “general competency” in
609 SCP CP/OCP guidelines (Appendix E.5).

610 Process Consultation/Action Research. Similarly, process consultation (Schein, 1965;
611 1969; 1985; 1987; 1999) is an important General Competency and OCP competency in each I-G-
612 O domain. Schein considers process consultation to be integral in a philosophy of *helping* that
613 stands in contrast to medical [doctor/expert] consulting approaches. While never depriving a
614 client (individual, group, or system) of one’s expertise, Schein (1989) details the value of starting
615 in a process consultation mode, which means working from several basic assumptions:

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

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

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

628 Other general competency areas are: intervention; knowledge of theory and case
629 studies; research methods and statistics; business operations [financial, legal, industry
630 standards, technological advances]; and professional ethics and standards.

631 Intervention, defined earlier as “*activities the consultant and consultee think have*
632 *the best chance of effectively solving the problem*” (Dougherty, 2000), refers to the
633 psychological procedures and processes introduced into the organization. Standard,
634 classical activities and innovations or variations fill volumes of “how to” books, such as
635 the early University Associates publication of Pfeiffer & Jones series called “Structured
636 Experiences,” now published as handbooks by Jossey-Bass.

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

643 Multi-cultural, international, and life span competencies represent a learning area that
644 cuts across the domain levels. Consulting psychologists acquire appropriate understanding of
645 and sensitivity to multi-cultural / international issues as well as learning “identity group”
646 consulting skills (Sue, Arredondo, McDavis, 1992; Triandis, 1987; House, Hanges, Ruiz-
647 Quintanilla, Dorfman, Javidan, Dickson, et.al, 1999; Dana, 2001; O’Roark, 2002).

648 While genuine, appropriate behavior is considered germane to effectiveness in every
649 consulting venture, working with international clients and multicultural workgroups brings the
650 U.S. consultant’s credibility and relevance under intensified scrutiny. The challenge for the
651 organizational consultant is to temper interventions with consideration of the client’s *zeitgeist*,
652 *ortgeist*, *weltanschauung*, and *erlebnistypus* [the ‘spirit’ of the time and the place/situation,
653 outlook on the world, and client’s experience balance]. The total of such dynamics is referred to
654 as becoming “culture-centered” in the Multicultural Guidelines.

655 In the interest of articulating a way of proactively addressing “anticipated impact of the
656 proposed guidelines [applying skills, techniques, and models included in these guidelines] on
657 diverse individuals and groups with respect to cultural, individual, and role differences” (BEA
658 correspondence, 8/9/04, McDonald to O’Roark), the published model for an International
659 Organizational Consulting Process is included. Called “Calibration Consultation” it is an
660 adaptation of a full-cycle “action research” process which calls for the consultation to learn the
661 organization’s culture before imposing an intervention. Calibration and *guanxi* calls for the
662 consultant to calibrate cultural dimensions and build relationships in the client organization
663 before recommending any type of psychological intervention or organizational improvement
664 activity (see E. 7 and Section III on Organizational/Systemic Consulting Psychology
665 Competencies).

666 Research methods and statistics competencies will not only enable the consultant to
667 conduct surveys, interpret formal assessment data, and build empirical evidence of effectiveness
668 of interventions, this will provide a good beginning base for understanding business operating
669 finances. OCP consultants who do not develop comfort and competence in reading

670 organizational financial reports and budgets will be at a distinct disadvantage when competing
671 with business administration management consultants or when coaching high level executives.

672 Understanding business operations also means knowing legal constraints on
673 competing for contracts, becoming familiar with industry-wide regulations such as the
674 international standards established in IPSO, and technological advances that have
675 impacted the way businesses do business. Technology and the virtual workgroup will
676 comprise a whole new chapter in the upcoming edition of the basic handbook / reference
677 book on leadership (Bass, in-process, expected publication 2005).

678 Professional ethics and standards compliance is considered as a pervasive, general
679 competency in the OCP guidelines model. Knowledge of the psychologists' code of ethics will
680 permeate each of the three domains of interventions, and are re-addressed as the concluding
681 section of the OCP guidelines, using a portion of a paper presented in one of the frequent SCP
682 convention symposia dedicated to ethical issues. Particular ethics references are included in
683 several of the following sections, for example: Standard 2: Competence (General Principles,
684 Assessment, paragraph 2); Standard 4: Privacy and Confidentiality (Individual Domain,
685 paragraph 7) and, Standard 9: Assessment (Individual Domain, paragraph 2,4,5).

686 **Domain-Specific Competencies**

687 Domain-Specific competencies are organized into three broad domains of psychological
688 expertise that are considered important in becoming competent as an organizational consulting
689 psychologist: individual, group, and organizational/systems [I-G-O]. This I-G-O model is
690 primarily intended for organizing and conceptualizing purposes when thinking about curriculum
691 design issues and continuing education programs; we assume that to some degree competencies

692 in each domain will interact with one another and that the effective practice of CP/OCP draws
693 simultaneously on competencies relevant at each of the levels.

694 Although specific competencies do not always neatly fit within a single domain, grouping
695 by focal categories of the organization levels serves as a useful organizing metric in thinking
696 through the issues of how best to train people to become consulting psychologists. Within each
697 of the three domains a series of specific competencies is identified as having primary, but not
698 exclusive, relevance to that intervention domain. Illustrative competencies include:

699 Primarily Individual-level Core Competencies:

- 700 • Individual assessment for purposes of career and vocational assessment
- 701 • Individual assessment for purposes of employee selection or development
- 702 • Job analysis and culture calibrations for purposes of individual assessment
- 703 • Executive and individual coaching
- 704 • Individual-level intervention for job and career-related problems
- 705 • Awareness of relevant ethical principles: i.e., confidentiality, culture-centered
706 awareness/understanding/*guanxi* as they apply in the OCP context

707 Primarily Group-level Core Competencies

- 708 • Assessment of functional and dysfunctional group behavior
- 709 • Assessment and development of teams with attention to diversity considerations
- 710 • Creating group level teams in organizations (e.g., self-directed work groups)
- 711 • Inter-group assessment and intervention
- 712 • Group boundary assessment and intervention
- 713 • Identity group (racial, gender, ethnic, age, nationality, sexual orientation, life span, disability
714 groups, social prejudice, culture, religion, belief systems, organizational hierarchy role).

715 Primarily Organizational/Systemic-level Core Competencies

- 716 • Organizational diagnosis including systemic assessment of the entire organization or large
717 component parts of the organization and diversity cohorts within the organization's
718 stakeholder groups.
- 719 • Attitude, climate, and satisfaction surveys, including partitioned profiles representing work
720 units, organizational level groups, diversity/multicultural groups, and upfront/non-negotiable
721 announcements of ethical commitments: esp. confidentiality
- 722 • Evaluation of corporate management philosophy, organizational culture and nature of
723 systemic stressors
- 724 • Work-flow and project planning activities [e.g., gannt, pert, fishbone]
- 725 • Identification of aggregate performance measures; charting and plotting measures
- 726 • Assessment of organizational values and management practices and philosophy/policy
- 727 • Organizational level interventions; collating data; partitioning data; intervention design
- 728 • Change management of organizational systems

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

732 **I. Individual-Level Domain: Consulting Psychology Competencies**

733 In the individual domain, consulting psychologists learn the skills for performing
734 assessments and interventions centered on persons as separate entities in organizational and work
735 contexts. Consulting psychologists are recommended to learn the knowledge, skills, and abilities
736 required to assess and intervene with individuals in non-clinical work- and career-related

737 contexts, and how to differentiate between situations requiring assessment or intervention with
738 abnormal psychological conditions and those with the more normal range of behavior.

739 A. Individual-Level Assessment - Doctoral level consulting psychologists understand
740 and learn to competently employ individual level assessment methods and techniques
741 appropriate for the types of problems and issues confronted by individuals in work, career, and
742 organizational contexts. They become competent in psychometric issues in individual
743 assessment, and procedures for conducting valid individual level assessments and evaluations for
744 purposes of career assessment, personnel selection, personal development, and in the context of
745 determining appropriateness for, and specific needs of, coaching and counseling of persons in the
746 work and career context. Such assessments are based on relevant evaluations using, as
747 appropriate, psychological tests and other assessment procedures and include understanding of
748 the legal and regulatory context in which individual assessments occur (Ethical Principles of
749 Psychologists and Code of Conduct 2002, Standard 9).

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

757 Doctoral-level consulting psychologists learn individual level assessment methodologies,
758 including skills required for the administration and interpretation of a representative-level sample
759 of relevant instruments and in providing feedback to individuals completing such measures

760 (Ethical Principles of Psychologists and Code of Conduct 2002, 9.01-9.11). These guidelines
761 intentionally do not specify a list of assessment devices, procedures, or psychological tests (e.g.,
762 specific measures of occupational interests, abilities, and personality traits) in which consulting
763 psychologists become competent, since any such list would quickly become outdated or
764 irrelevant. It is advised that the consulting psychologist learn meta-skills in individual-level
765 psychological test administration, interpretation, and feedback and experience administering,
766 interpreting, and providing feedback with a sufficiently large number of scientifically sound
767 instruments that new tests can quickly be mastered as they become available.

768 For competence in working at the individual level, the CP learns to define relevant
769 assessment questions, to choose appropriate instrumentation, to administer the relevant tests, and
770 to provide feedback, both test results and pertinent behaviorally-based feedback, to all relevant
771 parties. Feedback includes helping the individual(s) assessed (and other relevant parties, such as
772 third parties) understand the results and limitations of the assessment, helping to place the results
773 in the appropriate organizational context, such as company culture and employee classifications
774 and federal/state regulatory obligations (as represented in payroll categories, union membership,
775 and safety requirements) addressing the affective aspects of such feedback, and helping identify
776 relevant individual – situational implications of the results of the assessment (including, but not
777 limited to: interpersonal, identity groups, corporate purpose/values/structure/management
778 practices).

779 Thus, consulting psychologists learn to identify and put into a developmental and
780 organizational context the strengths and limitations of each of several assessment methods:
781 empirical methods (e.g., behavioral, content analysis), psychometric methods (cognition-
782 learning, affect-behavior, conation-willing i.e., integrative decision making), and more intuitive

783 methods (projective and other). The history of the development of each methodology is
784 supplemented with detailed exposure to preferred techniques, emphasizing the strengths and
785 limitations that pertain to diagnostic outcomes specific to CP/OCP: classification for description,
786 evaluation, placement; classification for performance competency; classification for consultant-
787 intervention, therapeutic recommendations, or referral for clinical treatment.

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

797 B. Individual-Level Interventions - Consulting psychologists learn to implement a range
798 of interventions that focus on the individual development level and are sensitive to life span
799 perspectives and individual experiences. These interventions can be classified as educational,
800 training; coaching; and, counseling.

801 1. Educational - Consulting psychologists learn how to provide educational-based
802 interventions for individuals. The goal of such activities would be to promote the acquisition and
803 use of new knowledge by clients. The range and depth of such educational interventions will
804 vary greatly and may incorporate various modalities including face-to-face and various
805 telecommunications-based formats.

806 2. Training - Practitioners learn how to provide training interventions for individuals.
807 The goals of such activities are to assist individuals in developing and strengthening skills
808 relevant to the workplace. The range and types of skills applicable to jobs are enormous, and it is
809 not expected that organizational consulting psychologists be able to demonstrate competency in
810 all of them. However, practitioners are able to assess problems and design skill-building
811 interventions that will help clients manage the challenges that they face.

812 3. Coaching - Practitioners learn how to provide competent, assessment-anchored
813 coaching and other individual-level interventions. The goals of such activities include helping
814 clients to improve their abilities to diagnose problems that they are confronting in the workplace,
815 to change problematic attitudes, values, beliefs, and behaviors that may interfere with their
816 performance, and to improve their skills, self-awareness, and self-efficacy in their work related
817 roles. Coaching may include education and training interventions as part of a package of
818 activities that are usually negotiated and delivered to a client in the context of a formal
819 agreement.

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

827 Foci For Individually Directed Interventions: CP/OCP training programs prepare
828 practitioners to intervene with individuals in the workplace who may be encountering a wide

829 variety of problems and issues. To be sure and inevitably, the academic and practice aspects of
830 the programs will not be able to expose students to the full array of difficulties and challenges
831 that clients may present to them once they leave school or when transitioning into CP / OCP.
832 However, there are some foci for individual interventions that may be reasonable to include in
833 curriculum and programs. These can include such specific applications as those named below.

834 Representative Individually-Oriented Consulting Competencies

- 835 • Career management
- 836 • Coaching on managerial roles and behaviors
- 837 • Fostering the development of leadership and followership behavior
- 838 • Technical roles in organizations
- 839 • Interpersonal relationships and psychosocial challenges, with analysis and
840 accommodation of issues related to diversity (race, gender, values, sexual orientation,
841 age, nationality) in organizations
- 842 • Intrapyschic aspects of work such as motivation, resistance to change, and emotional
843 management
- 844 • Crisis management concerning individual behavior in organizations
- 845 • Individual performance in relationship to groups and organizations
- 846 • Role conflict management
- 847 • Assisting individuals to work effectively in globally oriented, culturally diverse
848 organizations and within a multicultural work force. (Guidelines on Multicultural
849 Education, Training, Research, Practice, and Organizational Change for Psychologists,
850 2002)
- 851 • Life Span Perspectives

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

856 C. Self-Awareness, Self-Management, and Professional and Psychological Maturity – A
857 general CP competency area is elaborated here since it addresses the OCP as an individual and
858 most individual level assessment and intervention methods involve demonstration of certain
859 personal characteristics. Graduate-level and postdoctoral training programs, which can include
860 one-on-one supervision relevant for learning individual intervention skills, assist learners in
861 developing the capacity for self-directed reflection. “Acknowledging the potential for the self to
862 inadvertently cause harm to clients through acts of omission or commission, whether from
863 ignorance or arrogant assumption, the international consultant takes time to hone the self-as-
864 instrument “(O’Roark, 2002, p.520).

865 This involves an ability to receive appropriate critical feedback from clients and
866 colleagues, and a willingness to change behavior as needed [without violating essential ethics] to
867 work effectively with individuals with diverse identity group, organizational culture, and social
868 backgrounds in work-related contexts. It is recommended that organizational consulting
869 psychologists have learning experiences that expose them to models and methods for
870 accomplishing these tasks and to demonstrate a reasonable ability to implement them. The
871 capacity for developing self-awareness and self-management can be strengthened and deepened
872 in a wide variety of ways. Curricular descriptions and policies of postdoctoral programs are
873 suggested as ways to inform learners how the faculty assists with the achievement of
874 professional and psychological maturity necessary for effective practice in the field.

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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, however, does not pertain only to the interpersonal relations among members of task or cohort groups. Group domain competencies also address such phenomena as role analysis, leader-follower behavior, interpersonal conflict, workflow intergroup relations, diversity, authority dynamics, labor-management relations and inter-organizational relations.

Crucial propositions are: (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 inter-organizational 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: (1) the self in relation to these phenomena, such as personal prejudice and bias, (2) relevant concepts and theories from social psychology, (3) specific and relevant case studies and statistical research results, and (4) 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 is missing, or if all are not brought together in a congruous fashion, then additional OCP education is recommended.

Types of Group-Level Assessment and Interventions - This section elaborates specific

types of group level assessment and intervention approaches suggested as competencies for

898 which an organizational consulting psychologist is trained: role analysis and re-negotiation;
899 group formation and development; group and intergroup problem solving; identity groups and
900 intergroup relations; and, group level interventions.

901 A. Role Analysis and Re-negotiation - The purpose of these activities is to enable
902 individuals in roles within organizations to understand the forces that shape their roles and to
903 take constructive initiatives to adjust those forces that cause dysfunctional consequences for
904 themselves and/or the organization.

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

910 B. Group Formation and Development – Relevant OCP activities include facilitating
911 group leaders and members to form a group, establish productive relations between leader and
912 members, develop constructive relations among peers within the team, and fashion cooperative
913 relations between the focal team and other groups, organizations, and stakeholders with whom
914 the team must interact in order to perform effectively or achieve the group objective.

915 Consulting psychologists who provide this service learn to understand their own pre-
916 dispositions toward authority and group dynamics; gain working knowledge of theories of group
917 and intergroup dynamics; become familiar with the empirical research on groups in organizations
918 and the multicultural literature; and learn methods for diagnosing problems of the team,
919 designing interventions to address those problems, and preparing the leader, team members
920 and/or others who may be involved in implementing interventions. The OCP gains competency

921 in identifying both optimal, positive models of functioning and those that are dysfunctional
922 and/or pathology-driven.

923 C. Work Groups and Intergroup Problem Solving – The OCP learns intervention skills
924 that assist two or more identified groups with improving their relationship in order to carry out
925 *interdependent work assignments* more effectively. Activities may be developed for operational
926 groups (such as engineering and production or production and sales) that have different functions
927 along a flow of work, between different hierarchical-level groups (such as between field units
928 and headquarters), between entities attempting to merge, between labor and management groups,
929 or between culturally diverse members of the work group

930 Recommended competencies for OCP who provide these services include learning to
931 understand their own predispositions toward authority and intergroup relations (especially those
932 that involve ethnocentric forms of conflict) in order to determine whether they can proceed to
933 work alone, or invite one or more consultants representing different perspectives to assist in
934 delivering the service. In situations requiring a team of consultants, which may stem from self-
935 insight, or simply the size of a project and number of participating client-individuals,
936 organizational consulting psychologists who work together are prepared to manage their
937 relations with one another and in relation to the client in ways that enhance rather than diminish
938 the quality of service.

939 D. Identity Groups and Intergroup Relations - Identity group membership is defined in
940 terms of birth and biology, including variables as race, ethnicity, nationality, gender, family,
941 generation, gender identity, disability, aging, religion, social stigma, prejudice, and sexual
942 orientation. The OCP goal of interventions is to eliminate group-level forces that result in
943 members of some identity groups within organizations being treated unfairly by members of

944 other identity groups on such matters as work assignments, salaries, and promotional
945 opportunities. Interventions to alter unfairness among identity groups include educational
946 activities that expand the knowledge and self-awareness of individuals, and designing and
947 recommending procedures that adjust distribution of authority and power among identity groups
948 within organizations.

949 Competencies recommended for organizational consulting psychologists who provide
950 these services include methods for assessing their own identities in relation to the client
951 organizations where they provide services, and learn strategies for working cooperatively with
952 members diverse identity groups to effect change (e.g., whites with blacks, women with men,
953 etc.). They become knowledgeable about theory and research concerning the identity groups and
954 cultures with which they interact. They adapt interventions appropriate to the conditions found in
955 organizations, and the diagnosed problems facing work groups.

956 E. Group-Level Interventions - Consulting psychologists learn to apply what they have
957 learned about groups to address specific issues and problems within the organizational/systems
958 context. Relevant competency areas include, e.g., managing group conflict, enhancing group
959 functioning so that it is better aligned with organizational objectives, assisting groups in creating
960 conditions of social support to ameliorate the effects of organizational and occupational stress,
961 and helping organizations design work groups that effectively bridge individual and
962 organizational needs.

963 **III. Organizational/Systemic-Level Domain: Consulting Psychology Competencies**

964 This domain focuses on interventions in which entire organizations are either the targeted
965 intervention level, or in which the organization itself is integral in effecting changes to segments
966 of the larger organization or system. In order for the OCP to play useful roles in conducting

967 organization-level interventions, recommended competencies include developing, managing, and
968 interpreting surveys (such as, organizational culture assessments and employee opinion
969 /satisfaction polls); designing and participating in leadership of organizational strategic planning,
970 change management programs; and organization effectiveness/ management development
971 programs or research and evaluation functions. Competencies recommended in conjunction with
972 this domain of intervention include those addressing organization theory and design;
973 organizational assessment competencies: organizational diagnosis; organizational change; and
974 the consultation process.

975 A. Organization Theory and Design /Organization Structures: Prior to practicing
976 organization-level assessments and interventions, consulting psychologists learn about
977 organizations, understand structures and systems for organizing work, and develop a solid
978 theoretical foundation from which to make recommendations. Training in organizational theory,
979 behavior, and design are the foundations from which intervention are designed. Relevant topic
980 areas include: organizational theory: modern and historical (e.g., scientific management, the
981 human relations movement, open systems theory, and organizational diagnostic theory);
982 organizational structure and design (e.g., legal structures; centralization/decentralization, matrix
983 configurations); organizational ecology (e.g., the effects of size, growth, market and life cycle);
984 organizational effectiveness (business planning; financial indicators; industry benchmarking)
985 globalization (economic, social, and legal challenges; multilingual and multicultural issues);
986 organizational diagnosis; and organizational culture and ethics.

987 B. Organizational Assessment Competencies: Organizational Diagnosis: The goal of
988 organizational diagnosis is to develop an understanding of a system (it's purpose, where things
989 are going well, where things are not going well) by its members by using the methods of applied

990 behavioral science. The phases of organizational diagnosis include entry, data collection,
991 analysis, and feedback.

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

997 The organizational consulting psychologist learns to present the findings from the
998 organizational diagnosis, both orally in appropriately designed meetings and in writing. A full
999 blown organizational diagnosis potentially addresses all of the foregoing areas of group-level
1000 inquiry (i.e., roles, teams, work-flow, and identity groups) as well as organizational/systemic
1001 constructs. The requirements for proper preparation in each of those areas apply to
1002 organizational diagnosis as well. Conversely, methods used in organizational diagnosis are also,
1003 often, applied at the group and individual levels of interventions.

1004 Developing expertise in organizational surveying and other assessment methodologies
1005 involves learning how to translate theory into applied practice. Skills to be mastered include
1006 systematic data collection efforts including survey design implementation and evaluation. In
1007 learning to design surveys, attention is paid to item design and item/survey evaluation. Practice
1008 in developing surveys, pilot testing them on representative samples, and evaluating these pilots
1009 can be covered through a combination of class projects and practica. Expertise in general survey
1010 design topics might also be addressed, including the effects of factors such as survey length,
1011 methods of distribution (anonymity, paper-and-pencil vs. IVR), and management (database
1012 theory and design, data security).

1013 In implementation of survey projects, a skill in client definition [who is the key client,
1014 who comprises the client constituency to be surveyed], and, learning to develop and negotiate
1015 clear, realistic contracts remains critical. Consulting psychologists also learn project skills,
1016 including managing a project from initial conceptualization to implementation and outcomes
1017 evaluation. As part of this process, consulting psychologists learn to consider such issues as:
1018 incorporation of key stakeholders, development and execution of communication plans,
1019 formative and summative evaluations, and continuous quality and operational improvement of
1020 the process itself. Additionally, it is recommended that consideration and costing of alternative
1021 organizational assessment procedures be covered, helping students learn how to compare and
1022 contrast the cost-benefits of alternative strategies.

1023 Evaluating diagnostic techniques includes learning to use statistics to examine reliability
1024 (test-retest and internal consistency) and validity (content, construct, criterion) of assessment
1025 devices. It is recommended that classical test methods, and item-based methods such as IRT, be
1026 covered in conjunction with this work. It is advisable for the organizational consulting
1027 psychologist to learn a variety of diagnostic assessment methodologies, including those
1028 associated with the use of the psychologist him- or herself as an instrument for accurate
1029 organizational diagnosis.

1030 C. Organizational Change: The organizational change domain focuses on working with
1031 organizations undergoing changes that are atypical for that organization in amount, quality, or
1032 both. A thorough understanding of client preferences concerning perceived change needs,
1033 organization design, theories of organizational change (including drivers of both organizational
1034 inertia and organizational resilience), and an understanding of the characteristic psychological

1035 processes change evokes, and how to manage those reactions, provides the foundation for
1036 effective intervention.

1037 Organizational change approaches and theories of change necessarily incorporate
1038 knowledge and theories in the individual, group, and organizational domains, developmental
1039 theories, incorporation of the organization's history, and change management theories and
1040 practice. Knowledge of workplace stressors and stress management techniques becomes
1041 particularly useful during change interventions. Positive approaches (e.g., those based on
1042 appreciative inquiry) are as important as those oriented to dysfunction (Lloyd, & Veneziano,
1043 2002).

1044 Consultation Process Management. The OCP competencies listing will be an evolving set of
1045 recommendations, which will likely continue to include knowledge and skill relevant for each
1046 consultation phase: contact and entry; contract formulation; problem identification and
1047 diagnostic analysis; goal setting and planning; action taking (intervention); and contract
1048 completion – continuity and support. These service delivery and project management
1049 competencies are integral in brief as well as extended consultations. Additional education and
1050 training is important for those CP who operate psychological consulting firms or departments
1051 within firms offering broader-range consulting services to businesses, industries, agencies, and
1052 organizations.

1053 First and Last: Ethics. Recommendations for ethical competencies associated with the
1054 practice of OCP are associated with ten questions that permeate every consultation and the
1055 answers infuse the services provided. It is suggested that, in addition to familiarity with the APA
1056 Code of Ethics, dialogue with a Mentor- Consultant and/or at regular professional association

1057 gatherings enables an organizational consulting psychologist to keep ethical competencies fresh
1058 and active.

1059 ➤ Who is my client? The organization? The manager? The individual employee?

1060 ➤ What are the parameters of confidentiality in the client's expectation? Are they
1061 acceptable to me?

1062 ➤ Are the goals of the organization and consulting contract congruent with my personal and
1063 professional values and ethics?

1064 ➤ What rights, power, and freedom does each individual participant in the consultation
1065 process have? Are these acceptable to me?

1066 ➤ How do I balance the task dimension and the human dimension of my work with this
1067 organization?

1068 ➤ What control do I have over the use and dissemination of information I gather as a
1069 consultant?

1070 ➤ What are the parameters of my accountability? Are they acceptable to me?

1071 ➤ Do I have the skills to be an effective and efficient consultant to this organization and for
1072 this concern?

1073 ➤ How do I bridge the gap between maintaining the high standards of my profession and
1074 the profit motive that permeates consultation?

1075 ➤ How do I maintain objectivity and independence and avoid being used by one faction of
1076 the organization?

1077 Ethical dilemmas for Consulting Psychologists, in general, and Organizational Consulting

1078 Psychologists in particular were introduced into the most recent editing of the APA Ethical
1079 Principles and greater specificity and clarity is being developed. For example, the SCP Fellows
1080 Invited Address at the 2005 APA Convention will speak to these dilemmas (Bradt, 2005):

1081 “Codes of ethics are most helpful when they are specific and unambiguous. Our APA
1082 code is very clear about some of the thou-shalt-nots, as in sex with clients/patients, and it is also
1083 quite straightforward about conflict of interest issues, e.g., the dual relationship pitfalls. But
1084 codes are less helpful addressing questions of how one should react when personal values clash
1085 with perceived values of the individual or organizational client.

1086 “Such questions may arise in two contexts. One involves decisions about whether to
1087 accept employment or contract work with an organization. The other involves questions of what
1088 to do if, in the course of providing service to a client, one discovers a profound difference in
1089 values.”

1090 Former SCP President Kenneth Bradt suggests that while all professions have codes of
1091 ethics and while heavy legal requirements speak to some issues, individual decisions often come
1092 down to very personal value judgments of right and wrong. Those in the behavioral sciences and
1093 especially the helping professions may confront them more often, perhaps in part because they
1094 are attuned to the broader social implications of their work. Those engaged in organizational
1095 consulting psychology will face difficult and unexpected decisions when they encounter
1096 behaviors and philosophies within an organization that are repugnant to them personally. Thus,
1097 attention to ethical issues becomes a first, last and ongoing area for competency maintenance and
1098 refinement.

1099

1100

1101 **Section D: References**

1102 References used as policy parameters, guides, and prototype models are named in
1103 A.3.(b). Representative “References” of classic and recent literature is provided as a starting
1104 point for those interested in exploring organizational consulting psychology further.

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1263

1264 **Section E: Appendices**

1265 **E.1. Brief Background Information: Authors/ Contributors to CP/OCP Guidelines**

1266 **E.2. 1997/8 CP/OCP Guidelines Planning Grid**

1267 **E.3. SCP CP/OCP Guidelines Development Timetable**

1268 **E. 4. Brief Reviews of Invited Feedback from APA Divisions**

1269 **E.5. Overview of CP/OCP Guidelines: Principles, General Competencies,**
1270 **Domain Specific Competencies**

1271 **E. 6. . Most Influence on 20th Century Consulting Psychology, p.1. SCP 1999-2000**
1272 **Survey**

1273 **E.7. International Organizational Consulting Process (IOCP). A Calibration**
1274 **Consultation Model for Proactive Attention to Clients, suggested for**
1275 **Proactive Multicultural and International Intervention**

1276

1277