

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

**Prepared for the  
Society of Consulting Psychology (SCP)  
Division 13 of the American Psychological Association  
By  
Ann M. O’Roark, SCP Council Representative  
Paul J. Lloyd, SCP Past Council Representative  
Stewart E. Cooper, SCP Past Education & Training Chair  
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(OCP)**

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

*2004 Version*

*Ann M. O’Roark, SCP Council Representative*

*Paul J. Lloyd, SCP Past Council Representative*

*Stewart E. Cooper, SCP Past Education & Training Chair*

**Section A. Introduction**

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

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

**A.1. Terminology**

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

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

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

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

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

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

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

This initial mapping of CP/OCP is intentionally a broad, general outline of three relevant areas

of competency for OCP practice, the Individual (I), Group (G), and Organizational (O). The IGO competencies are placed within the framework of competency requirements recognized as important for doctoral level education and training in psychology. Following endorsement of this first articulation, the intention is to extend the competency map to include suggestions for psychologists at the several stages of their career in OCP: beginning, entry/transition, midlevel, and senior. This OCP document serves as the model for developing consulting guideline documents tailored for psychologists whose consulting is based on expertise in particular specialties and public interest fields, such as mental health, forensic, sports, aids, diversity, environmental impact and life span.

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

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

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

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

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

In summary, OCP guidelines were developed in response to perceived need based on three types of evidence: an increase of interest among psychologists in CP/OCP without a corresponding growth in education and training programs focused on that area of practice (Hellkamp, Zins, Ferguson, & Hodge, 1998; Munz, 1977); an increase of literature in recent years distinctive to the practice of CP and, especially, OCP that needed to be synthesized (O’Roark, 2000); and, a growing consensus of professional support for the three-domain competency model for preparation to practice CP/OCP (E.4). It is anticipated that consulting competencies relevant, for example, for a mental health or school psychologist will include knowledge and skills pertinent to each I-G-O domain, but will not include all competencies named for OCP practitioners.

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

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

psychology (CP/OCP). Towards that end, this document is the result of iterative drafts [1999 – 2004] that have been periodically distributed for comment and feedback from SCP members, APA divisions and governance groups, and non-APA colleagues.

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

#### Participants.

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

During the 1998 Midwinter Conference and Board Meeting, division leaders identified members with publication and experience background in the several guidelines domains. These individuals were invited to become part of the special E&T task group to draft guidelines. A pool of individuals interested in the E&T exploration of consulting proficiencies had initially been developed by inviting conference attendees with background and time to devote to the E&T work to put their names on chart paper sheets [with topical labels] that were placed on meeting room walls during the 1996 and 1997 Midwinter Conferences (DeWayne Kurpius, E&T Chair, 1995-98, Appendix E.3).

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

The work of this E&T work group was informed by surveys of CP/OCP practice conducted by SCP leaders during the previous decade (Hellkamp, D. T. & Morgan, L., 1990; Hellkamp, D.T., 1993;

Robinson-Kurpius, Fuqua, Gibson, Kurpius, & Froehle, 1995). After analyzing survey results and reviewing recent literature, academic programs, and other division policies, the writers adopted the framework for the present guidelines for CP/OCP, consisting of: (a) overarching principles; (b) general competency domains; and (c) domain-specific competencies for the three-domain model for CP/OCP that focuses on individuals, groups, and organizations/systems. Appendix E.2 shows the plan for guidelines development with committee member assignments to different aspects of the guidelines with initial time-line projections and objectives.

#### Process.

Appendix E.3 presents a long view of division activities that were preliminaries to the current guidelines development process. During the division's 1998 Midwinter Conference the E&T writing group drafted objectives and steps for development of CP/OCP education and training guidelines. The *ad hoc* writing group established the final planning model and organizing framework during a conference call the following month. Subsequently, authors sent materials to the E&T chair for editorial suggestions and for integration of the several sections. Based on editorial comments received, a revised preliminary draft of the guidelines was disseminated to the midwinter SCP Board. Subsequent to that, two SCP symposia were conducted during the 1999 APA summer convention, offering forums for considering the need for OCP guidelines. They were framed around the following two themes: (1) *Do We Need Doctoral Level Programs In CP/OCP*, and (2) *Similarities And Differences Among Four Doctoral Level Psychology Programs Offering Concentration In Organizational Consulting*.

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

Substantive feedback received from outside SCP at that time came from APA divisions, notably Divisions 14 and 52. In order to supplement and extend the feedback data base, SCP published a special issue of its division journal, *Consulting Psychology Journal: Practice & Research (CPJ:P&R)(2000)*. Invited formal reviews of the guidelines came from four APA divisions with larger overlap memberships (Divisions 14, 16, 17, and 19), abstracts of which appear in Appendix E.4. Although each

of the articles offers a different perspective and emphasis related to particular competencies in organizational consulting, all included strong commendations for the SCP guidelines effort, expressing support for articulating and promulgating the guidelines. A few of the more complex recommendations made in the articles are under consideration by SCP for inclusion in its next articulation of these guidelines.

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

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

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

Council was unable to take action pending development of BEA procedures and criteria for the review of such documents. The item remains as new business "pending" before the Council. With the

Council's approval in February 2004 of the procedures and criteria for evaluating education and training guidelines developed by BEA, SCP revised and aligned the 2001 document which has been reviewed by BEA and is being forwarded with their endorsement and recommendation to the Board of Directors and for approval by the Council of Representatives at the February 2005 Meeting. Final editing language was inserted (pp.31, 33, 34) during the February 2005 Council meeting in response to requests from the Women's Caucus Group.

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

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

#### Policy Documents Relevant for Guideline Development

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

*Developing and Evaluating Standards and Guidelines Related to Education and Training in Psychology: Context, Procedures, Criteria, and Format* (APA/BEA, 2004a). This policy served as the formatting guideline for this 2004 re-alignment of the 2001 OCP guidelines that had been developed over across three years, 1997-2000. BEA staff advisors recommended revamping materials prepared by several separate writing groups to assure: Consistency in language, such as elimination of all "should" words, and inclusion of statements in each domain [individual, group, organizational/system] that addressed ethical, diversity, multicultural, life span, social-cultural issues, and legal considerations.

*American Psychological Association ASME Guidelines*, (APA, 1992). This APA policy, incorporating the guidelines statements from the professional Mechanical Engineering association, gave pertinent, constraining details relevant for articulating guidelines that might affect economic interests or competition in the general public arena. Distinguishing between OCP and management consultants without credentials in psychology becomes increasingly important for those practicing OCP and required specific attention to these legal risks. This policy emphasizes the need to obtain and consider views of all who will be affected by the guidelines, gathering consensus opinions, and maintaining

documentation of circulation of guidelines (See general competencies, section 10).

#### Policy Documents Relevant For Substantive Components

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

*Guidelines on Multicultural Education, Training, Research, Practice, and Organizational Change For Psychologists* (APA, 2003). This document [hereafter referred to as APA Multicultural Guidelines] was published after the OCP guidelines were initially prepared and presented to APA Council and will serve as a major resource for future updating work on these guidelines. Guideline #5: “Psychologists strive to apply culturally-appropriate skills in clinical and other applied psychological practices” (p.309-392) and Guideline # 6 “Psychologists are encouraged to use organizational change processes to support culturally informed organizational (policy) development and practices” are of particular importance, especially the education and training aspects.

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

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

*Guidelines for Psychotherapy with Lesbian, Gay, and Bisexual Clients* (2000) is an APA approved set of practice guidelines that incorporate an educational component. This document and the APA Multicultural Guidelines (2003) provide examples of educational components that will inform the updating OCP guidelines, developed prior to publication of either APA policy document.

*Guidelines for Education and Training at the Doctoral Level in Industrial/Organizational Psychology* (SIOP, 1998); and, *Principles for the Validation and Use of Personnel Selection Procedures, 4<sup>th</sup> Edition* (SIOP, 2003). The I/O guidelines were reviewed and discussed by the SCP guidelines writers prior to initial draft preparations. The principles will be useful for updating OCP guidelines. Similarities and differences between CP/OCP and the SIOP guidelines are noted by the SIOP reviewer of the guidelines for the *Consulting Psychology Journal*, see Appendix E.4. The envisioned expansion of CP guidelines to address consultation education and training in clinical, counseling, and school psychology will reflect similar overlaps with guidelines developed for those fields and are noted by other division’s reviewers summarized in E.4.

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

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

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

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

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

The SCP E&T Committee will plan for the review and update the proposed guidelines on a regular basis. No later than five years after APA approval of the proposed guidelines, the SCP E&T chair will present a schedule for updating, including recommendations for an *ad hoc* review committee, a timetable for presenting an updated draft to the SCP Board for review, to the division APA Council Representative, and to the APA Board of Educational Affairs for APA governance reviews prior to APA Council re-endorsement in time for the update required by Association Rule 80.3. A new E&T ad hoc workgroup, appointed in 2001, articulated OCP guidelines as a division white paper document that elaborates skills associated with consulting career phases: Beginning Level (0-3 experience, first career choice); Entry Level (0-3 years experience in some field not considered organizational psychology); Mid-Level (4-7 years experience); and Senior Level (8+ years experience in OCP). SCP/APA Division 13's Professional Affairs Committee articulated a division issues paper/policy regarding licensure issues that has been edited by and approved by the SCP Board. An expansion of consulting guidelines for psychologists specialized in mental health, forensic, school, sports, multicultural, and international issues is awaiting completion of the OCP prototype.

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

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

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

The review process has improved clarity and internal consistency the SCP Guidelines. Careful attention to terminology has been given in reviews so as to be consistent with APA policy guidance on such matters. Eight iterations of the initial draft guidelines have been completed. A chart of the guidelines model was introduced. All key terms were defined and any language implying “should” or “must” was replaced.

### **C.2. Validity of guidelines**

Validity for the proposed guidelines is documented through references listed in this document

and, more extensively, in literature cited in the 32 chapters of the *Handbook of Organizational Consulting Psychology: A Comprehensive Guide to Theory, Skills, and Techniques*, conceptualized by the SCP Board and the E&T Committee, edited by Rodney Lowman, and published by Jossey-Bass (2002).

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

Identity-group research and interventions are prominent in all I –G – O domains and are explicated in greatest detail, to avoid redundancy, under group domain competencies. Diversity and international issues are included in the OCP model as a General Competency. A proactive model, *calibration consultation*, for international organizational consulting is provided in Chapter 21 of the *Handbook of Organizational Consulting Psychology* (O’Roark, 2002), and incorporates most of the competencies described in this document.

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

The substance of the guidelines follows.

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

Society for Consulting Psychology (SCP) / Division 13

American Psychological Association (APA).

**Purpose of the Guidelines**

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

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

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

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

[\(www.apa.org/divisions/div13/\)](http://www.apa.org/divisions/div13/)

Also relevant to these guidelines is the general definition of psychological practice noted in *Model Acts*

of the American Psychological Association (1987) and the Association of State and Provincial Psychology Boards (1992). Practice of Psychology is defined (ASPPB, 1992, pp. 4-5) as:

*the observation, description, evaluation, interpretation, and/or modification of human behavior by the application of psychological principles, methods, or procedures, for the purpose of preventing or eliminating symptomatic, maladaptive, or undesired behavior and or enhancing interpersonal relationships, work and life adjustment, personal effectiveness, behavioral health and mental health. The practice of psychology includes, but is not limited to, psychological testing and the evaluation or assessment of personal characteristics, such as intelligence, personality, abilities, interests, aptitudes, and neuropsychological functioning; counseling, psychoanalysis, psychotherapy, hypnosis, biofeedback, and behavior analysis and therapy; diagnosis and treatment of mental and emotional disorder or disability, alcoholism and substance abuse, disorders of habit or conduct, as well as psycho educational evaluation, therapy, remediation, and consultation. Psychological services may be rendered to individuals, families, groups, organizations, institutions and the public. The practice of psychology shall be construed within the meaning of this definition without regard to whether payment is received for services rendered [certain exemptions are noted, e.g., for teaching and research].*

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

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

CP/OCP guidelines note that the effective practice of CP/OCP, ideally, draws simultaneously on

general competencies applicable in every domain, for example: recommended adherence to the scientist-practitioner model; recognition of the evolving nature of the field; acknowledging the multiple avenues for preparation for various roles as a CP; encouraging self awareness and self-management; relationship development; assessment competency; process consultation; interventions and methodological diversities required to meet contextual uniqueness; knowledge of theory, case studies, empirical research; application of multicultural/international competencies; research methods and statistics; technological advances, business operations, industry regulations, legal considerations; and advocating knowledge of and adherence to ethical and legal parameters;

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

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

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

Domain Specific Competencies. The OCP guidelines address attention to I-G-O competencies pertinent to the work of consulting: 1) Individual Level/Domain Interventions; 2) Group Level/Domain

Interventions; and, 3) Organization/Systems Level/domain Interventions

### **Overarching Principles**

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

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

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

No single model of empirical research, however, is assumed to have a monopoly on truth by the endorsement of the "scientist-practitioner" model of consultation. CP/OCP trainees learn, e.g., not just about research methodologies but also about the role of the consultant as an active participant in the consulting process at hand (Lippitt & Lippitt, 1978). Action research, an assessment or study of the situation and problem undertaken by the consultant prior to the implementation of particular consultation services or interventions, is traced to Kurt Lewin (1951). An example of such practice in OCP is the joint consultant-client determination of an organizations' needs or critical problems and ideal outcomes, sometimes called *calibration consultation*, a process that is important when applying complex constructs to practical problems (Schein, 1985), especially in international or multicultural organizations (O'Roark, 2002).

Evolving Field. CP and OCP have evolved over time. The body of knowledge and methods of service delivery escalated in the past two decades, stimulated by the writings and publications of former SCP President, Thomas Backer (1982a, b). DeWayne Kurpius, 1991 winner of SCP/APA13's award for

lifetime achievement in consulting to organizations, prepared a consulting psychology reading-list for a survey conducted while he was E & T chair for SCP. Results of a 1999 SCP survey (E.6) of “the best of the century” in consulting psychology reports names of psychologists with greatest influence on contemporary consulting psychologists, as well as listing 68 authors and 93 titles (O’Roark, 2000). Top rated writings in APA Division 13’s millennium survey were similar to the earlier Kurpius survey: *Organizational Diagnosis* (Levinson, 1972); *Process Consultation* (Schein, 1969); *Intervention Theory and Methods* (Argyris, 1970); and, *The Theory and Practice of Mental Health Consultation* (Caplan, 1970). Carl Rogers is cited six times. Three of these nominations are for his book, *Freedom to Learn* (1969). Edgar Schein received four citations, two for his book, *Organization Culture and Leadership* (1985 & 1992) and two for *Process Consultation* (1969). Other top rated writings are: Block (1981); Caplan and Caplan (1993); Lippitt and Lippitt (1978); Senge (1990); and Tobias (1990).

OCP will continue to evolve, and sometimes to use techniques that have received limited research investigation. The concern is to do so in an ethical manner. Standard 2.e of the 2002 *Ethical Principles of Psychologists and code of Conduct* (2002) was specifically written to provide guidance. It states “(e) **In those emerging areas in which generally recognized standards for preparatory training do not yet exist, psychologists nevertheless take reasonable steps to ensure the competence of their work and to protect clients/patients, students, supervisees, research participants, organizational clients, and others from harm.**” This standard is highlighted in regularly offered Ethics Workshops sponsored by SCP and is also attended to in articles published in the Division’s two official publications, *Consulting Psychology: Practice and Research, a journal*, and the *Consulting Psychologist, the division newsletter*.

Non-Exclusivity. OCP guidelines recognize that there are appropriate ways other than doctoral training in CP/OCP to become proficient in the competencies here described (for example, applied research and practice in sports psychology, a field historically prominent in European psychology: Foster, 2002. *Enhancing Peak Potential in Managers and Leaders: Integrating Knowledge and Findings from Sport Psychology*). Academic training in areas such as Industrial/Organizational Psychology (e.g., Society for Industrial and Organizational Psychology, 1998) and Clinical or Counseling Psychology provide considerable training that is relevant for the practice of CP. These guidelines are intended to

assist in the specific development of doctoral programs, postdoctoral training, and continuing education institutes/workshops in CP/OCP.

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

### **General Competencies**

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

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

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

of earlier drafts and their supportive recommendation to the APA Council.

Two general competency areas, Self Awareness / Self Management and Relationship Development are prerequisites for all areas of psychological practice. Graduate level education, practicum, or internship work pertinent to these competencies ideally include close critiquing of personal value and belief systems as well as analysis of interpersonal exchanges with colleagues and clients. Self-Awareness and Relationships Development competencies apply in each of the I-G-O domains of consulting services. Psychologists learn how to build constructive, *collaborative relationships* with a variety of types of people and organizational representatives. They learn how to maintain both objectivity and personal engagement as they work with clients to further specific consultative goals.

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

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

Assessment competencies for organizational consulting can be depicted on dual continua: scientist- practitioner and theory to practice. While assessment approaches, methods, and instruments vary dramatically according to the I-G-O domain of focus and cultural context, skills to be developed in assessment, regardless of I-G-O focus, include identifying (observing, using logical deduction), integrating (classifying), and inferring (matching evidence to goals and assessment schema), in order to assist in decision making, in implementing change, or in improving understanding (Barclay, 1991). Assessment, generically, is the systematic process of making inferences in order to arrive at a diagnosis for use in informed decision-making regarding interventions. Special attention to and need for assessment in preparation to work with multicultural groups and international organizations is highlighted and defined in the “calibration consultation” model (O’Roark, 1995; 2005).

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

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

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

Process consultation/action research is included in the SCP OCP guidelines as a general competency goal. Process skills contribute to a number of other competency areas and illustrate a hallmark expertise in OCP. Process skills are integral to organizational assessment and in most forms of intervention.

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

Intervention, defined earlier as “*activities the consultant and consultee think have the best chance of effectively solving the problem*” (Dougherty, 2000), refers to the psychological procedures and processes introduced into the organization. Standard, classical activities and innovations or variations fill volumes of “how to” books, such as the early University Associates

publication of Pfeiffer & Jones series called “Structured Experiences,” now published as handbooks by Jossey-Bass.

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

Multi-cultural, international, gender, and life span competencies represent a learning area that cuts across the domain levels. Consulting psychologists acquire appropriate understanding of and sensitivity to multi-cultural / international issues as well as learning “identity group” (which is defined to include but not be limited to national heritage, age, occupational field, educational experience, race, ethnicity, culture, gender, sexual orientation, and disability status) consulting skills (Sue, Arredondo, McDavis, 1992; Triandis, 1987; House, Hanges, Ruiz-Quintanilla, Dorfman, Javidan, Dickson, et.al, 1999; Dana, 2001; O’Roark, 2002).

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

In the interest of articulating a way of proactively addressing “anticipated impact of the proposed guidelines [applying skills, techniques, and models included in these guidelines] on diverse individuals and groups” (APA 2004) with respect to corporate culture, gender, individual, and role differences, the published model for an International Organizational Consulting Process is a variation on the *calibration consultation* model used for working in the USA with multicultural work groups, unique structural configurations, and employee subgroupings such as gender, first language groups, payroll groups,

union-nonunion employees. The process is adapted from the full-cycle “action research” process which calls for the consultant to learn the organization’s culture before imposing an intervention. Calibration and *guanxi* [Chinese: instrumental relationship development] are terms that call attention to the need for the consultant to calibrate cultural dimensions and build relationships in the client organization before recommending any type of psychological intervention or organizational improvement activity (see E. 7 and Section III on Organizational/Systemic Consulting Psychology Competencies).

Research methods and statistics competencies will not only enable the consultant to conduct surveys, interpret formal assessment data, and build empirical evidence of effectiveness of interventions, this will provide a good beginning base for understanding business operating finances. OCP consultants who do not develop comfort and competence in reading organizational financial reports and budgets will be at a distinct disadvantage when competing with business administration management consultants or when coaching high level executives.

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

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

### **Domain-Specific Competencies**

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

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

Primarily Individual-level Core Competencies:

- Individual assessment for purposes of career and vocational assessment
- Individual assessment for purposes of employee selection or development
- Job analysis and culture/diversity as found in race, ethnicity, gender, sexual orientation, disability status, socioeconomic status, national heritage, industry, education, job/role calibrations for purposes of individual assessment
- Executive and individual coaching
- Individual-level intervention for job and career-related problems
- Awareness of relevant ethical principles: i.e., confidentiality, culture-centered awareness/understanding/*guanxi* as they apply in the OCP context

Primarily Group-level Core Competencies –

- Assessment of functional and dysfunctional group behavior
- Assessment and development of teams with attention to diversity (here and after used to refer to the full range of diversity variables )considerations
- Creating group level teams in organizations (e.g., self-directed work groups)

- Inter-group assessment and intervention
- Group boundary assessment and intervention
- Identity group (racial, gender, ethnic, age, nationality, sexual orientation, life span, disability groups, social prejudice, culture, religion, belief systems, organizational hierarchy role).

#### Primarily Organizational/Systemic-level Core Competencies

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

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

### **I. Individual Domain. Consulting Psychology Competencies**

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

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

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

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

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

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

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

**B. Individual-Level Interventions** - Consulting psychologists learn to implement a range

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

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

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

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

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

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

Representative Individually-Oriented Consulting Competencies

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

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

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

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

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

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

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

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

Consulting psychologists who provide this service learn to understand their own pre-dispositions

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

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

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

D. Identity Groups and Intergroup Relations - Identity group membership is defined in terms of birth and biology, including variables as race, ethnicity, nationality, gender, family, generation, gender identity, disability, aging, religion, social stigma, prejudice, and sexual orientation. The OCP goal of interventions is to eliminate group-level forces that result in members of some identity groups within organizations being treated unfairly by members of other identity groups on such matters as work assignments, salaries, and promotional opportunities. Interventions to alter unfairness among identity groups include educational activities that expand the knowledge and self-awareness of individuals, and

designing and recommending procedures that adjust distribution of authority and power among identity groups within organizations.

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

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

### **III. Organizational/Systemic-Level Consulting Psychology Competencies**

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

A. Organization Theory and Design /Organization Structures: Prior to practicing organization-level assessments and interventions, consulting psychologists learn about organizations, understand

structures and systems for organizing work, and develop a solid theoretical foundation from which to make recommendations. Training in organizational theory, behavior, and design are the foundations from which intervention are designed. Relevant topic areas include: organizational theory: modern and historical (e.g., scientific management, the human relations movement, open systems theory, and organizational diagnostic theory); organizational structure and design (e.g., legal structures; centralization/decentralization, matrix configurations); organizational ecology (e.g., the effects of size, growth, market and life cycle); organizational effectiveness (business planning; financial indicators; industry benchmarking) globalization (economic, social, and legal challenges; multilingual and multicultural issues); organizational diagnosis; and organizational culture and ethics.

B. Organizational Assessment Competencies: Organizational Diagnosis: The goal of organizational diagnosis is to develop an understanding of a system [it's purpose, where things are going well, where things are not going well] by its members by using the methods of applied behavioral science. The phases of organizational diagnosis include entry, data collection, analysis, and feedback.

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

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

Developing expertise in organizational surveying and other assessment methodologies involves learning how to translate theory into applied practice. Skills to be mastered include systematic data collection efforts including survey design implementation and evaluation. In learning to design surveys, attention is paid to item design and item/survey evaluation. Practice in developing surveys,

pilot testing them on representative samples, and evaluating these pilots can be covered through a combination of class projects and practica. Expertise in general survey design topics might also be addressed, including the effects of factors such as survey length, methods of distribution (anonymity, paper-and-pencil vs. IVR), and management (database theory and design, data security). In implementation of survey projects, a skill in client definition [who is the key client, who comprises the client constituency to be surveyed], and, learning to develop and negotiate clear, realistic contracts remains critical. Consulting psychologists also learn project skills, including managing a project from initial conceptualization to implementation and outcomes evaluation. As part of this process, consulting psychologists learn to consider such issues as: incorporation of key stakeholders, development and execution of communication plans, formative and summative evaluations, and continuous quality and operational improvement of the process itself. Additionally, it is recommended that consideration and costing of alternative organizational assessment procedures be covered, helping students learn how to compare and contrast the cost-benefits of alternative strategies.

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

C. Organizational Change: The organizational change domain focuses on working with organizations undergoing changes that are atypical for that organization in amount, quality, or both. A thorough understanding of client preferences concerning perceived change needs, organization design, theories of organizational change (including drivers of both organizational inertia and organizational resilience), and an understanding of the characteristic psychological processes change evokes, and how to manage those reactions, provides the foundation for effective intervention.

Organizational change approaches and theories of change necessarily incorporate knowledge and theories in the individual, group, and organizational domains, developmental theories, incorporation of the organization's history, and change management theories and practice. Knowledge of workplace

stressors and stress management techniques becomes particularly useful during change interventions. Positive approaches (e.g., those based on appreciative inquiry) are as important as those oriented to dysfunction.

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

First and Last: Ethics. Recommendations for ethical competencies associated with the practice of OCP are associated with ten questions that permeate every consultation and the answers infuse the services provided. It is suggested that, in addition to familiarity with the APA Code of Ethics, dialogue with a Mentor- Consultant and/or at regular professional association gatherings enables an organizational consulting psychologist to keep ethical competencies fresh and active.

- Who is my client? The organization? The manager? The individual employee?
- What are the parameters of confidentiality in the client's expectation? Are they acceptable to me?
- Are the goals of the organization and consulting contract congruent with my personal and professional values and ethics?
- What rights, power, and freedom does each individual participant in the consultation process have? Are these acceptable to me?
- How do I balance the task dimension and the human dimension of my work with this organization?
- What control do I have over the use and dissemination of information I gather as a consultant?
- What are the parameters of my accountability? Are they acceptable to me?
- Do I have the skills to be an effective and efficient consultant to this organization and for this

concern?

- How do I bridge the gap between maintaining the high standards of my profession and the profit motive that permeates consultation?
- How do I maintain objectivity and independence and avoid being used by one faction of the organization?

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

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

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

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

#### **Section D: References**

References used as policy parameters, guides, and prototype models are named in A.3.(b). Representative “References” of classic and recent literature is provided as a starting point for those

interested in exploring organizational consulting psychology further.

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