

Professional Human Capital Leaders In Education Certification *Body of Knowledge*

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INTRODUCTION

Introduction

The Human Capital Leaders in Education (HCLE) standards outline the competencies that leaders in PK-12 education and related organizations need to strategically manage human capital (HC) processes at the department, team, or individual level. The Professional Human Capital Leader in Education (pHCLE) certification program is rooted in the HCLE standards and reflects mastery of the pHCLE body of knowledge (BoK). As an HC leader, earning pHCLE certification will help you grow your knowledge and skills and use what you've learned to impact your organization and the students it serves. This document describes the pHCLE BoK, as well as requirements and processes for certification. For more information, visit [HCLLeader.org](https://www.hcleader.org).

pHCLE Certification

Examination

The pHCLE certification exam is a proctored, online exam that can be completed from most devices with an internet connection and a web camera, such as a laptop or desktop computer. The 2.5-hour exam is composed of multiple-choice questions directly aligned with the HCLE Professional Standards. The exam is available 24/7, and you are not required to schedule a specific time to complete it. Before your testing window opens, you will receive an email with instructions on how to prepare your workspace, login, and access your exam. You can then take the exam at your preferred date and time using the instructions provided.

Preparation

Exam preparation supports offered by AASPA-approved providers include virtual and in-person options. For example, Experience Management Institute's exam preparation supports include a fully virtual option and a hybrid (in-person and virtual) option. The virtual option comprises 10.5 hours of live class sessions over seven weeks, in addition to 40 hours of asynchronous coursework. The hybrid option includes two full days of in-person training, as well as 40 hours of asynchronous coursework. More information is available at [HCLLeader.org](https://www.hcleader.org).

Certification

You will receive your exam score within one week of the close of your testing window. If your score meets or exceeds the cutoff for pHCLE credentialing, you will receive a certificate in the mail, along with recommendations for displaying your credentials as part of your professional email signature. Your pHCLE certification is valid for three years, at which point you are eligible to recertify by sharing how you have grown and contributed to the field.

HCLE STANDARDS

pHCLE Standards

In 2021, AASPA, Experience Management Institute, and a national committee of PK-12 HC leaders collaborated to update the pHCLE standards. Feedback collected during a public commenting period was incorporated into the new standards update. The standards define the core HC knowledge domains along with the skills needed to improve talent practices in education:



HCLE domains

The HCLE standards are organized across seven domains. The three content domains are **Talent Acquisition**, **Talent Development**, and **Total Rewards**. The four cross-cutting domains, which bolster the content domains, are **Strategy**, **Risk Management**, **Process Management**, and **Experience Management**. Each of these domains is discussed further in the Body of Knowledge section below.

Additionally, the following set of governing principles provide guidelines for professional behavior and the everyday work of HC leaders in education. These principles informed the writing of the standards and are directly and indirectly referenced throughout them.

- **Ethical Leadership:** Committed to responsible decision-making and modeling high levels of professional conduct. Successful HC leaders consider potential benefits and risks when making decisions and take every precaution to make a positive impact and avoid harm.
- **Diversity, Equity, & Inclusion:** Value individual differences, eliminate barriers to participation, and ensure all voices are heard. Successful HC leaders consider diversity, equity, and inclusion in all aspects of talent management.
- **Learning Mindset:** Seek opportunities to improve and leverage research-based best practices. Successful HC leaders never stop learning, and they promote a culture of learning throughout their organization.

HCLE STANDARDS

Body of Knowledge

This BoK expounds on the HCLE professional standards to help pHCLE candidates prepare for the certification exam. Each HCLE domain is defined and explained to offer insight into the types of topics that will be covered on the exam. The topics below are not an exhaustive list of what may be assessed but are meant to clarify the types of knowledge and skills candidates should master.

Bloom's Taxonomy

The standards under every HCLE domain are broken down into objectives to help candidates understand what they are expected to know and be able to do in order to earn their pHCLE certification. Each objective is tagged with a level of cognition, as defined by the revised Bloom's Taxonomy (Anderson & Krathwohl, 2001). The most complex level of thinking captured by a set of objectives is listed next to the standard that corresponds with those objectives. This tagging system is used to help assessment developers design exam items and to assist candidates during their exam preparation.

Below are brief descriptions of the levels of the revised Bloom's Taxonomy.¹

1. **Remember:** Recognize or recall facts and information.
2. **Understand:** Interpret, summarize, organize, or clarify information.
3. **Apply:** Carry out a task or use acquired knowledge in a new context.
4. **Analyze:** Examine data or evidence, deconstruct information, and make inferences.
5. **Evaluate:** Critique, reflect, or make judgments based on evidence or criteria.
6. **Create:** Construct a new product, system, or solution by reorganizing information in a new way.

Intended Outcomes

The pHCLE content domains, cross-cutting domains, and guiding principles encompass the body of knowledge and skills needed by HC leaders today. When implemented effectively, these practices support the attraction and retention of top talent, as well as a positive and productive workplace culture. As such, the certification exam questions emphasize real-world application. The intent of the certification process is for candidates to immediately use their new knowledge and skills to increase the health of their organization and effectively serve all customers.

¹Adapted from: Anderson, L.W. & Krathwohl, D.R. (2001). *A taxonomy for learning, teaching, and assessing: A revision of Bloom's Taxonomy of educational objectives*. New York: Pearson

TALENT ACQUISITION

Talent Acquisition

The process of identifying talent needs and finding, attracting, and hiring qualified candidates to satisfy those needs.

Planning and Preparation

Practices that enable organizations to identify and address talent needs.

PP.1: Anticipate and monitor the organization's talent needs. (Analyze)

- Apply workforce planning techniques to identify gaps and trends and forecast future talent needs. *(Apply)*
- Manage staffing levels in alignment with organizational needs and priorities. *(Apply)*
- Examine job markets to understand labor supply and demand. *(Analyze)*

PP.2: Coordinate with hiring managers to identify staffing needs. (Apply)

- Connect with hiring managers to understand their staffing needs (e.g., types of candidates needed, updated job descriptions). *(Apply)*

PP.3: Ensure stakeholders understand their role in the talent acquisition process. (Apply)

- Include high-performing employees and others (e.g., students) in talent acquisition activities like employer branding, recruitment, realistic job previews, and interviewing. *(Apply)*
- Ensure people involved in talent acquisition processes are trained on essential topics (e.g., compliance, processes, customer focus, mitigating bias). *(Apply)*

PP.4: Conduct job analysis to identify position requirements and develop accurate job descriptions. (Apply)

- Apply job analysis techniques to identify the knowledge, skills, and abilities needed for specific positions. *(Apply)*
- Develop high-quality job descriptions. *(Apply)*
- Use job descriptions as building blocks for various HC management functions. *(Apply)*

TALENT ACQUISITION

Recruitment

Uncovering sources of high-potential candidates and identifying targeted strategies to convince qualified individuals to apply to your organization.

R.1: Use the organization's employee value proposition and employer brand to attract talent. (Analyze)

- Uncover the organization's employee value proposition (EVP) using various methods (e.g., stay interviews, surveys, focus groups). *(Analyze)*
- Establish an employer brand and EVP that aligns with the organization's overall brand. *(Apply)*
- Share the employer brand and EVP internally and externally. *(Apply)*

R.2: Prepare inclusive job advertisements for target candidate pools. (Apply)

- Recognize essential components of a high-quality job advertisement. *(Understand)*
- Screen for and eliminate biased or exclusionary language in job postings. *(Apply)*

R.3: Implement strategies for internal and external recruitment. (Apply)

- Use a variety of channels to connect with candidates. *(Apply)*
- Build talent pipelines through internal (e.g., succession planning) and external sources (e.g., community partnerships). *(Apply)*
- Increase workforce diversity through strategies for expanding the talent pool. *(Apply)*

R.4: Evaluate recruitment outcomes to inform talent acquisition strategies. (Analyze)

- Assess the effectiveness of various recruitment strategies. *(Analyze)*
- Identify characteristics of successful hires. *(Apply)*

Hiring

Assessing candidate qualifications to identify and extend a job offer to the most suitable candidate for an open position.

H.1: Implement a legally compliant hiring process. (Apply)

- Ensure selection and hiring methods comply with Federal legislation and guidelines concerning hiring (e.g., EEO, Title VII, adverse impact, FLSA). *(Apply)*

TALENT ACQUISITION

H.2: Apply methods to assess applicants and monitor for bias. (Apply)

- Recognize common types of bias and how they can factor into the hiring process. (*Understand*)
- Apply strategies for mitigating bias in hiring. (*Apply*)
- Utilize various methods for employee selection. (*Apply*)
- Identify the most efficient sequence and structure of the hiring process based on cost and effort (i.e., funneling). (*Understand*)
- Distinguish between interview techniques (e.g., behavior-based, situational/scenario-based). (*Understand*)

H.3: Extend employment offers and administer post-employment activities. (Apply)

- Complete pre-employment activities (e.g., background checks). (*Apply*) Extend verbal and written offers. (*Apply*)
- Ensure equity and fairness when developing employment contracts. (*Apply*)
- Administer post-employment activities (e.g., new hire forms, new hire communications).

H.4: Provide a positive hiring experience to candidates and internal stakeholders. (Analyze)

- Apply customer service principles to create recruitment and hiring experiences that are transparent and positive. (*Apply*)
- Offer realistic job previews to prospective candidates. (*Apply*)
- Leverage technology to maximize efficiency and accessibility in the hiring process. (*Apply*)
- Analyze data and candidate feedback to improve hiring process. (*Analyze*)

Talent Development

Actions that foster employee learning and growth.

Orientation and Onboarding

Supporting employees throughout transitions into or within the organization.

O.1: Facilitate employee-centric orientation processes. (Apply)

- Distinguish between orientation (i.e., induction) and onboarding. *(Understand)*
- Communicate need-to-know information effectively with new hires. *(Apply)*
- Apply customer service principles to ensure a positive orientation experience for new hires. *(Apply)*

O.2: Create onboarding experiences that foster inclusion. (Apply)

- Recognize and implement the components of an effective onboarding process. Create an inclusive onboarding experience. *(Apply)*

O.3: Prepare supervisors and other employees for their role in orientation and onboarding. (Apply)

- Offer training and support to supervisors around onboarding best practices. *(Apply)*
- Communicate onboarding best practices with employees who will support new hires. *(Apply)*

Performance Management

Maintaining or improving job performance through ongoing supervisor and employee interactions.

P.1: Assist stakeholders with implementing evaluation and support systems. (Apply)

- Understand organizational evaluation requirements for educators and all other staff. *(Understand)*
- Assist in communicating evaluation requirements, timelines, and supports. *(Apply)*
- Support the development of performance management systems that align with organizational priorities. *(Apply)*

P.2: Train evaluators to accurately differentiate performance and use results to inform decision-making. (Apply)

- Differentiate between types of appraisal tools and techniques. *(Understand)*
- Train supervisors on essentials of conducting fair and equitable performance evaluations. *(Apply)*
- Consult with supervisors on the use of performance management for professional growth. *(Apply)*
- Facilitate connections between performance management and other areas of human capital management. *(Apply)*

P.3: Enact workplace policies. (Apply)

- Assist organizational leaders in developing equitable and inclusive policies. *(Apply)*
- Communicate workplace policies and expectations in a transparent manner. *(Apply)*
- Assist management/leadership in affording due process to address discipline issues. *(Apply)*
- Implement policies in a way that is fair, ethical, and legal. *(Apply)*

Training & Development

Learning activities that support the acquisition of new skills, knowledge, and abilities.

TD.1: Distinguish between training and development approaches and outcomes. (Apply)

- Offer training to individuals/teams based on their job duties. *(Apply)*
- Align learning approaches to desired outcomes. *(Apply)*

TD.2: Create or select training and professional development aligned with employee needs. (Apply)

- Apply adult learning principles to design effective training and professional development. *(Apply)*
- Assess employees' training and development needs. *(Apply)*
- Provide training and development that align with learner needs, intended outcomes, and the learning context. *(Apply)*
- Maintain professional development infrastructure. *(Understand)*

TD.3: Evaluate training and development activities. (Analyze)

- Measure the effectiveness of training and development activities. *(Apply)*
- Use evidence to improve training and professional development offerings. *(Analyze)*
- Communicate and track mandatory training requirements. *(Apply)*

TOTAL REWARDS

Total Rewards

All the financial and experiential incentives, rewards, and benefits provided to employees as part of their employment journey.

Compensation & Benefits

Components of your total rewards program that have a clearly defined value or cost.

CB.1: Implement a total rewards program that aligns with employee needs. (Analyze)

- Communicate the components of a total rewards program. *(Apply)*
- Assess employees' needs and preferences around total rewards. *(Analyze)*
- Offer a variety of total rewards to meet employee needs. *(Apply)*

CB.2: Ensure internal and external equity of compensation. (Analyze)

- Identify types of compensable factors. *(Remember)*
- Employ job evaluation techniques to ensure internal equity. *(Analyze)*
- Select appropriate benchmarks for assessing the competitiveness of compensation with other organizations. *(Apply)*

CB.3: Administer a transparent and legally compliant compensation system. (Apply)

- Recognize the implications of Federal laws and regulations on total rewards practices. *(Understand)*
- Administer employee compensation systems and benefits programs while adhering to the organization's total rewards structures, policies, and processes. *(Apply)*
- Assist employees with understanding payroll processes and resolving issues. *(Understand)*

Work-life Integration

Supports to help employees achieve success both at and outside of work.

W.1: Design jobs to motivate and engage employees. (Apply)

- Apply research and theories on employee engagement and motivation to improve the quality of work life. *(Apply)*
- Differentiate between the drivers of engagement and burnout. *(Understand)*
- Implement interventions to increase engagement and mitigate burnout. *(Apply)*

W.2: Promote a culture that values work-life integration. (Apply)

- Recognize employee needs for managing boundaries between work and personal life. *(Apply)*
- Establish policies and practices that address work-life integration. *(Apply)*

TOTAL REWARDS

W.3: Provide resources and opportunities that help all employees fulfill their potential. (Apply)

- Establish opportunities for employees to feel supported and connected. *(Apply)*
- Provide reasonable accommodations for employees in the workplace. *(Apply)*

Career Management

Programs that assist employees with defining and achieving their career goals.

CM.1: Implement processes for job transitions. (Apply)

- Communicate processes for transfers, promotions, demotions, and supplemental job roles. *(Apply)*
- Ensure equitable processes for job transitions. *(Apply)*

CM.2: Administer career advancement programs. (Apply)

- Communicate programs that support career advancement. *(Apply)*
- Prepare employees for future job roles or advancement opportunities. *(Apply)*
- Apply succession planning techniques. *(Apply)*
- Assess the quality and effectiveness of career advancement programs. *(Apply)*

CM.3: Manage employee exits. (Analyze)

- Distinguish between types of employee exits. *(Remember)*
- Analyze data on employee turnover to identify and address trends. *(Analyze)*

CROSS-CUTTING DOMAINS

Strategy

Targeted actions to achieve goals and improve student outcomes in alignment with the mission, vision, and values of the organization.

S.1: Align HC strategy to organizational strategy in support of student success. (Analyze)

- Recognize the components of a strategic plan and their purpose. *(Understand)*
- Apply analysis tools (e.g., SWOT, PESTLE) to understand the current state and develop a future state for department or team strategy. *(Analyze)*
- Create vertical alignment between HC procedures and organizational strategy. *(Apply)*
- Create horizontal alignment among human capital functions. *(Apply)*

S.2: Identify different types of organizational structures and decision-making processes. (Understand)

- Distinguish between different types of organizational structures and the benefits and challenges of each. *(Understand)*
- Identify the strengths and challenges of centralized and decentralized decision-making. *(Understand)*
- Identify stakeholders and their roles in human capital functions. *(Understand)*

S.3: Support the effective and equitable stewardship of resources to maximize benefits for students. (Analyze)

- Align resource allocation with organizational priorities. *(Apply)*
- Apply common budgeting, resource allocation, and sustainability techniques. *(Apply)*
- Identify federal funding sources to support HR functions. *(Apply)*
- Monitor resource access and usage. *(Analyze)*

CROSS-CUTTING DOMAINS

Risk Management

Proactively identify, assess, and address risks to a project, plan, process, person, or education organization.

RM.1: Communicate a working knowledge of laws, policies, procedures, and agreements related to HC practices. (Apply)

- Recognize the implications of federal laws and guidelines on HR functions. *(Apply)*
- Conduct internal compliance audits. *(Apply)*

RM.2: Ensure compliance with data governance, privacy, safety, and HC policies. (Apply)

- Manage data, recordkeeping, and information sharing in compliance with legal guidelines. *(Apply)*
- Maintain privacy and confidentiality when handling personally identifiable information, data, or sensitive material. *(Apply)*
- Implement protocols to prevent workplace injuries and illnesses. *(Apply)*
- Prevent bullying, harassment, and microaggressions. *(Apply)*

RM.3: Assess and manage risk to a process or project. (Analyze)

- Identify types of potential risk. *(Apply)*
- Conduct quantitative and qualitative risk assessment. *(Analyze)*
- Mitigate risks to the organization and its stakeholders. *(Apply)*

RM.4: Participate in the negotiation of agreements and contracts. (Apply)

- Understand laws that inform the collective bargaining process. *(Understand)*
- Recognize and use various negotiation techniques. *(Apply)*
- Implement the terms of agreed-upon contracts. *(Apply)*

RM.5: Maintain positive labor relations. (Apply)

- Distinguish between strategies for conflict mediation and dispute resolution. *(Understand)*
- Address employee complaints or grievances in an ethical and confidential manner. *(Apply)*
- Apply strategies to build trust and maintain open communication with unions and employee representatives. *(Apply)*

CROSS-CUTTING DOMAINS

Process Management

Continuously define, measure, analyze, and improve the way work is accomplished to enhance student, employee, and organizational outcomes.

PM.1: Use mapping tools to define and share processes. (Apply)

- Document processes and standard operating procedures (SOPs) using process maps. *(Apply)*
- Communicate processes with stakeholders. *(Apply)*

PM.2: Apply process improvement methodologies and tools. (Analyze)

- Recognize different methodologies for process improvement and how they are used. *(Understand)*
- Conduct root cause analysis. *(Analyze)*
- Identify and decrease waste. *(Apply)*

PM.3: Identify key performance indicators (KPIs). (Understand)

- Differentiate between metrics and KPIs. *(Recognize)*
- Identify KPIs that align with organizational priorities. *(Understand)*
- Select appropriate data display tools to monitor progress. *(Apply)*

PM.4: Collect valid and reliable data for decision-making. (Apply)

- Identify types of data and their implications for decision-making. *(Understand)*
- Recognize characteristics of high-quality data and factors that impact data quality. *(Understand)*
- Mitigate risks to ensure data quality and privacy. *(Apply)*
- Adhere to ethical standards for data collection and use. *(Apply)*

PM.5: Leverage technology to improve performance and increase equity. (Apply)

- Leverage technology tools to automate or streamline HR functions. *(Apply)*
- Manage data using technology. *(Apply)*
- Use technology to make the workplace accessible and equitable. *(Apply)*

PM. 6: Support employees through the change process. (Understand)

- Recognize barriers to change and techniques for facilitating change. *(Understand)*
- Differentiate between change models. *(Understand)*

CROSS-CUTTING DOMAINS

Experience Management

Purposefully design, implement, and improve interactions to create an inclusive environment for students, employees, and the community.

EM.1: Understand expectations and experiences throughout the customer journey. (Apply)

- Identify internal and external customers. *(Understand)*
- Apply experience management tools to assess touchpoints in the customer journey. *(Apply)*

EM.2: Provide exceptional customer experiences. (Apply)

- Differentiate between customer service and customer experiences. *(Understand)*
- Embed customer focus throughout the human capital management system. *(Apply)*
- Understand drivers of employee engagement. *(Understand)*

EM.3: Implement inclusive and equitable policies and practices that meet the needs of a diverse workforce. (Apply)

- Promote inclusion through interactions, communications, and supports. *(Apply)*
- Create conditions that support a diverse and inclusive workplace. *(Apply)*
- Minimize barriers and increase access to opportunities for employment, learning, recognition, and growth. *(Apply)*

EM.4: Manage relationships with customers. (Apply)

- Establish two-way communication with customers. *(Apply)*
- Leverage multiple communication channels to manage relationships with customers. *(Apply)*
- Tailor communications approaches to resonate with target audiences. *(Apply)*

For more information
HCLeader.org