

# 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 comprises 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

## HCLE Standards

In 2021, AASPA, Experience Management Institute, and a national committee of PK-12 HC leaders collaborated to update the HCLE 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<sup>1</sup>.

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.

<sup>1</sup> Adapted 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 & Preparation

*Practices that enable organizations to identify and address talent needs.*

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

- Use data to assess the composition, strengths, and needs of the current workforce (e.g., demographic data, performance data, gaps in knowledge or skills). *(Analyze)*
- Forecast future talent needs based on data and identify gaps (i.e., gap analysis). *(Analyze)*
- Apply planning and resource allocation techniques for position control. *(Apply)*
- Examine local and regional job markets to understand labor supply and demand. *(Analyze)*

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

- As vacancies arise, connect with hiring managers to understand their staffing needs (e.g., types of candidates needed, updated job descriptions). *(Understand)*

#### 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)*
- Offer training on essential topics (e.g., compliance, processes, customer focus, mitigating bias) to all involved in talent acquisition processes. *(Apply)*

#### 4. Conduct job analysis to identify position requirements and develop accurate job descriptions. (Analyze)

- Conduct job analyses using various techniques (e.g., questionnaires, interviews, work logs). *(Analyze)*
- Identify the knowledge, skills, and abilities needed for each position. *(Analyze)*
- Recognize the components of a well-constructed job description (e.g., FLSA exemption status, essential functions, KSAs). *(Understand)*
- Write inclusive, non-discriminatory job descriptions that are aligned with organizational priorities. *(Apply)*
- Use job descriptions as building blocks for various HC management functions. *(Apply)*

### Recruitment

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

#### 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)*

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

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

# TALENT ACQUISITION

## 3. Build internal and external networks for recruiting. (Apply)

- Employ a variety of strategies (e.g., employee referrals, social media, recruitment fairs, virtual networking, job boards) to recruit 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 (e.g., grow your own, alternative certification). *(Apply)*
- Consider compensation practices that support recruitment (e.g., signing bonuses). *(Apply)*

## 4. Evaluate recruitment outcomes to inform talent acquisition strategy. (Analyze)

- Examine data around successful hires to determine sources of high-potential candidates. *(Analyze)*
- Use engagement metrics to build recruitment networks and share opportunities. *(Analyze)*
- Assess the return on investment (ROI) of various recruitment strategies. *(Analyze)*

## Hiring

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

### 1. Implement a legally compliant hiring process. (Apply)

- Ensure hiring methods comply with Federal legislation and guidelines concerning hiring (e.g., EEO, Title VII, disparate/adverse impact, FLSA). *(Apply)*
- Consider educator licensure requirements when developing hiring processes. *(Apply)*

### 2. Understand 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 (e.g., use of multiple measures, Rooney Rule). *(Apply)*
- Utilize various methods for employee selection (e.g., assessments of ability, job knowledge, or non-cognitive tests; resumé screening; interviews; performance tasks). *(Apply)*
- Identify the most efficient sequence and structure of the hiring process based on cost and effort (i.e., funneling). *(Understand)*
- Distinguish between different interview techniques (e.g., behavior-based, informational). *(Understand)*

### 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). *(Apply)*

### 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 to ensure transparency and fit. *(Apply)*
- Leverage applicant tracking systems to drive efficiency and improvements in the hiring process. *(Apply)*
- Collect and analyze staffing and hiring metrics (e.g., yield ratios, cost per hire, time to fill, feedback on customer service, diversity). *(Analyze)*

# TALENT DEVELOPMENT

## Talent Development

*Actions that foster employee learning and growth.*

### Orientation and Onboarding

*Supporting employees throughout transitions into or within the organization.*

#### 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)*

#### 2. Create onboarding experiences that foster inclusion. (Apply)

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

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

- Offer training and support to supervisors around onboarding best practices (e.g., 30-60-90-day onboarding process, mentorship). *(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.*

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

- Understand organizational (and if applicable, state-level) evaluation requirements for educators and 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)*

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

- Differentiate between types of appraisal tools and techniques. *(Understand)*
- Consult with supervisors on the use of performance management for professional growth (e.g., through formative feedback, goal setting, training, or individual growth plans, performance interventions). *(Apply)*
- Train supervisors on essentials of performance management (e.g., difficult conversations, mitigating bias, formative and summative evaluation, documentation). *(Apply)*
- Facilitate connections between performance management and other areas of human capital management (e.g., hiring, compensation, promotion, tenure). *(Apply)*

#### 3. Promote workplace policies. (Apply)

- Communicate workplace policies and expectations in a transparent manner (e.g., employee handbook, board policies, use of technology and social media). *(Apply)*



# TALENT DEVELOPMENT

## 4. Address employee discipline issues. (Apply)

- Assist management/leadership in affording due process to address discipline issues. (Apply)
- Implement disciplinary protocols in a way that is fair, ethical, and legal. (Apply)

## Training & Development

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

### 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)

### 2. Use adult learning and instructional design principles to create or select training and professional development. (Apply)

- Apply adult learning principles to design effective training and professional development. (Apply)
- Apply instructional design principles (e.g., universal design for learning, backward mapping) in the design of training and professional development. (Apply)
- Select facilitation techniques that align with learner needs, intended outcomes, and the learning context. (Apply)
- Know how to sustain a training and professional development infrastructure (e.g., learning management system, necessary structures and processes, communication). (Understand)

### 3. Evaluate training and development activities. (Evaluate)

- Measure the effectiveness of training and development activities using appropriate metrics (e.g., knowledge gained, knowledge applied, participant satisfaction) and at various levels (e.g., individual, team, organizational). (Analyze)
- Embed formative and summative assessment into training and professional development. (Apply)
- Use evidence to reflect on and improve training and professional development. (Evaluate)

# 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.*

#### 1. Communicate the components of a total rewards program. (Analyze)

- Communicate the components of a total rewards program (e.g., salary, benefits, non-cash rewards). *(Apply)*
- Assess employees' needs and preferences around total compensation. *(Analyze)*
- Select total rewards that meet employees' needs in creative ways (e.g., tuition assistance, workplace flexibility programs, employee recognition programs). *(Apply)*

#### 2. Ensure internal and external equity of jobs. (Analyze)

- Identify types of compensable factors. *(Remember)*
- Employ job evaluation techniques (e.g., point factor, factor comparison, job ranking, job classification) to ensure internal equity. *(Analyze)*
- Define competitive markets to inform compensation and talent acquisition practices. *(Apply)*

#### 3. Administer a transparent and legally compliant compensation system. (Analyze)

- Interpret compensation and benefits information, including internal (e.g., payroll, usage data) and external data (e.g., remuneration surveys). *(Analyze)*
- Manage payroll software, processes, and issue resolution. *(Understand)*
- Implement employee benefit programs, including communicating offerings, process, and timelines. *(Apply)*
- Implement employee compensation programs, including communicating placement/ classification, process, and timelines. *(Apply)*

### Work-life Integration

*Supports to help employees achieve success both at work and home.*

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

- Apply research and theories on employee engagement and motivation (e.g., job characteristics model) to improve the quality of work life. *(Apply)*
- Differentiate between the drivers of engagement and burnout. *(Understand)*

#### 2. Promote a culture that values work-life integration. (Analyze)

- Assess employee needs related to work-life integration. *(Analyze)*
- Establish policies and practices that encourage work-life integration (e.g., flexible scheduling). *(Apply)*

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

- Establish opportunities for employees to feel supported and connected (e.g., employee assistance programs, employee resource groups, volunteer opportunities). *(Apply)*
- Assist in creating communication channels between employees and organizational leadership using various techniques (e.g., surveys, focus groups, feedback loops). *(Apply)*
- Provide workplace accommodations for employees as needed. *(Apply)*

# TOTAL REWARDS

## Career Management

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

### 1. Communicate processes for transfers, promotions, and demotions. (Apply)

- Document processes for transfers, promotions, and demotions. *(Apply)*
- Apply succession planning techniques (e.g., nine-box grid). *(Apply)*
- Communicate job change and career pathway opportunities with employees using clear messaging and visuals. *(Apply)*

### 2. Administer career advancement programs. (Analyze)

- Offer learning opportunities for high-potential employees (e.g., mentoring, fellowships, leadership training). *(Understand)*
- Use data to ensure equitable access to career advancement programs. *(Analyze)*

### 3. Manage employee exits. (Analyze)

- Distinguish between types of employee exits (e.g., voluntary, involuntary, reductions in force) and attrition (e.g., regrettable, non-regrettable). *(Remember)*
- Conduct exit interviews or surveys and use the resulting data to drive organizational improvement. *(Analyze)*
- 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.*

### 1. Understand how organizational strategy should influence HC processes. (Apply)

- Distinguish between vision, mission, and values, and explain the functions of each. *(Understand)*
- Consider organizational strategy when developing HC systems and practices. *(Apply)*
- Participate in the organization's strategic planning process. *(Apply)*

### 2. Assist in developing a human capital strategy. (Analyze)

- Apply analysis tools (e.g., SWOT, PESTLE) to understand the current state and develop a future state for department or team strategy. *(Analyze)*
- Assist in setting a vision for the human capital management system. *(Apply)*
- Implement human capital functions (e.g., performance management, compensation) in a coherent and integrated manner. *(Apply)*

### 3. Identify different types of organizational structures and how they impact decision-making. (Understand)

- Distinguish between different types of organizational structures (e.g., functional, divisional, matrix) and the benefits and challenges of each. *(Understand)*
- Recognize how organizational culture shapes decision-making or functioning. *(Understand)*
- Identify roles and dynamics involved in decision-making. *(Understand)*

### 4. Support the effective and equitable stewardship of resources. (Analyze)

- Align resource allocation with organizational priorities. *(Apply)*
- Apply common budgeting, resource allocation, and sustainability techniques. *(Apply)*
- Track and assess resource allocation and usage. *(Analyze)*

## Risk Management

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

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

- Understand and abide by laws and guidelines concerning:
  - Hiring (e.g., EEO, Title VII, disparate/adverse impact, affirmative action, FLSA, independent contractors)
  - Compensation and benefits (e.g., COBRA, ERISA, FMLA)
  - Safety and risk mitigation (e.g., workers' compensation, OSHA)
  - Employee and labor relations (e.g., LMRA) *(Apply)*
- Identify funding sources (e.g., Title IIA) to support recruitment. *(Apply)*
- Prepare for compliance auditing. *(Apply)*
- Understand and abide by laws and policies concerning procurement. *(Apply)*

## CROSS-CUTTING DOMAINS

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

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

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

- Identify types of potential risk (e.g., lawsuits, bias, safety risks, security breaches). *(Apply)*
- Conduct quantitative and qualitative risk assessment. *(Analyze)*
- Mitigate risks to the health, security, and success of the organization and its stakeholders. *(Apply)*

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

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

### 5. Maintain positive labor relations. (Apply)

- Distinguish between strategies for conflict mediation and dispute resolution (e.g., arbitration). *(Understand)*
- Address employee complaints or grievances an ethical and confidential manner using various strategies (e.g., internal investigations, examination of working conditions, escalation to leadership as needed, preventing retaliation). *(Apply)*
- Apply knowledge of federal laws and guidelines to maintain positive employee and labor relations, honor employees' rights, and avoid unfair labor practices. *(Apply)*

## Process Management

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

### 1. Use mapping tools to define new and existing processes. (Apply)

- Document processes using tools like process maps, diagrams, and task/process analysis. *(Apply)*
- Communicate processes with stakeholders. *(Apply)*

### 2. Apply process improvement methodologies and tools. (Analyze)

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

### 3. Identify key performance indicators (KPIs). (Analyze)

- Identify human capital metrics that align with organizational priorities. *(Understand)*
- Collect and analyze metrics related to each state of the employee lifecycle. *(Analyze)*
- Present progress relative to KPIs via reports and graphical representations (e.g., dashboard, scorecard). *(Apply)*

## CROSS-CUTTING DOMAINS

### 4. Collect valid and reliable data for decision-making. (Evaluate)

- Distinguish between types of data (e.g., qualitative, quantitative) and metrics (e.g., leading, lagging). *(Understand)*
- Assess data quality based on their reliability, validity, utility, and other indicators. *(Evaluate)*
- Mitigate risks to data quality (e.g., bias, measurement error). *(Apply)*
- Use data to make recommendations and inform decision-making. *(Analyze)*

### 5. Leverage technology to improve performance and increase equity. (Analyze)

- Use technology to support knowledge management. *(Apply)*
- Leverage technology tools to automate or streamline HR functions. *(Apply)*
- Utilize HR information systems to address data needs and inform decisions. *(Analyze)*
- Use technology to make the workplace accessible and equitable. *(Apply)*

### 6. Support employees through the change process. (Understand)

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

## Experience Management

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

### 1. Solicit feedback to identify expectations and experiences throughout the customer journey. (Analyze)

- Distinguish between internal and external customers. *(Understand)*
- Seek customer feedback using various methods (e.g., surveys, interviews, focus groups). *(Apply)*
- Analyze feedback to improve each stage of the employee journey. *(Analyze)*

### 2. Provide exceptional customer experiences to employees, students, and the community. (Apply)

- Differentiate between customer service and customer experiences. *(Understand)*
- Embed customer focus throughout the HC management system. *(Apply)*

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

- Demonstrate cultural competence in employee interactions, communications, and supports. *(Apply)*
- Apply best practices for cultivating a diverse and inclusive workplace. *(Apply)*
- Minimize barriers and increase access to opportunities for employment, learning, recognition, and growth. *(Apply)*

### 4. Manage relationships with partners. (Apply)

- Use social media and other web-based strategies for relationship management. *(Apply)*
- Seek input from community members and other external partners. *(Apply)*
- Offer volunteer/community engagement programs. *(Apply)*
- Engage with philanthropic partners. *(Apply)*

For more information  
**HCLLeader.org**