



# **Scrum Alliance**

## **Certified Scrum Coach (CSC) Program**

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## Overview

### Certified Scrum Coach Program Definition

The Certified Scrum Coach (CSC) Program is a new certification designation for Scrum practitioners who are aiding organizations in adopting, transitioning, implementing, or scaling Scrum.

A Certified Scrum Coach must have been trained as a Certified ScrumMaster or Certified Scrum Product Owner, have multiple experiences as a Scrum practitioner, and have extensive experience in assisting teams and organizations implementing Scrum. The CSC program is an experience and skills-based program that requires deep knowledge and experience with Scrum, extensive Scrum coaching client engagements, strong agile leadership and consulting skills, and ongoing professional development.

### Definition of Scrum Coaching

Scrum coaching is defined as an engagement with one or more organizations/teams where the coach acts as a mentor or catalyst for those teams to improve their understanding and application of Scrum in reaching their stated objectives. It includes one-on-one and team mentoring, process facilitation, organizational development and alignment consultation, and interaction with multiple leadership levels within an organization. It may also include mentoring in methods related to the effectiveness of Scrum such as Agile Manifesto and principles, Lean principles and Extreme Programming practices.

### Relationship to other Certified Scrum Programs

The Certified Scrum Coach Program complements the other Scrum certification programs:

- The Certified Scrum Master (CSM) and Certified Scrum Product Owner (CSPO) education programs are the first step to understanding Scrum.
- The Certified Scrum Practitioner (CSP) program is a critical and necessary step in developing experience in Scrum through direct involvement as a ScrumMaster, product owner, team member or other stakeholder to realize the power and challenges in implementing Scrum.
- The Certified Scrum Trainer (CST) program is responsible for educating the next generation of Scrum practitioners and opening the door to Scrum within organizations.
- The Certified Scrum Coach (CSC) program facilitates adoption, transition, implementation and scaled rollout of Scrum throughout an organization.

Both CSC and CST designations require training as a CSM or CSPO and experience as a CSP, but they are independent from each other. In other words, you can be certified as a coach, as a trainer, or as both.

### Reasons for a Certified Scrum Coach Program

The Scrum Alliance recognizes the difficulties many organizations face in attempting to implement Scrum; Scrum is not a silver bullet with a step-by-step instruction manual, but rather a simple framework which uncovers very difficult challenges within the organization. Scrum also challenges traditional leadership models, roles, and behaviors and requires a culture of discipline which many organizations may have difficulty addressing independently.

The Scrum Alliance recognizes the benefits organizations have received from dedicated, professional, experienced Scrum practitioners in aiding them in their adoption and transition to Scrum and that having a designation representing proven experience and skills would aid companies seeking professionals to assist in their Scrum implementations.

The Scrum Alliance recognizes that the Certified ScrumMaster and Certified Scrum Product Owner programs are a critical and necessary first step in educating people in Scrum; however, they are often not sufficient in improving the likelihood of project success due to the very difficult challenges and entrenched traditional corporate cultures faced in most organizations. Experienced practitioners who have guided others through these transitions and implementations often make the difference for organizations through relevant application of practices, enhanced learning, and more rapid and channeled feedback.

## Scrum Alliance CSC Program Criteria

The following criteria were used as benchmarks in drafting this program:

- Achieving a CSC Certificate must be significant—having a CSC on the team should improve the likelihood of Scrum project success.
- A CSC Certificate must be renewed periodically to assure experience and skills are maintained.
- *Becoming* a CSC must require more effort, proof of experience, and knowledge than *renewing*.
- Criteria for becoming and maintaining a CSC must include knowledge, experience, and skills
- The CSC certification process must be reasonably simple—that is, it should be straightforward, comprehensible, and rigorous, yet not overly complicated to follow or administer.
- The CSC certification process must be scalable—that is, it must be able to certify more than 10 candidates per year as restricted by the current CST certification process.
- The CSC application submission process must be accessible via the web.

## CSC Program Team

The CSC program team consists of over a dozen members of the Scrum community. These members represent various roles involved in Scrum coaching client relationship including consultants, trainers, internal employees, and organizational leaders who have experience with Scrum and working with Scrum consultants. The Scrum Alliance provided direction, oversight, and review during the drafting process.

## CSC Program Drafting Process

The CSC program team has spent approximately six months composing an initial program structure which has undergone multiple review procedures including the Spring 2007 Scrum Gathering in Portland and an open proposal letter submitted to all members of the Scrum Alliance in the summer of 2007. We are now in the process of validating the program and application process through a series of internal and external test applicants.

## Referenced Certification Models

During the drafting process of the CSC Program, many different certification and coaching models were reviewed, including the International Coaching Federation, Certified Professional Facilitators, Project Management Institute, Lean Six Sigma, the developing agile leadership definition within the APLN, and multiple corporate internal Scrum coaching programs.

In some cases, we have leveraged existing concepts and definitions from other certification and coaching models, including the use of Professional Development Units (PDUs) from the Project Management Institute, and the code of ethics from the International Coaching Federation.

## Notice of Change

This program is in draft form and is expected to change. No text in this document represents decisions made by the Scrum Alliance, its board, or its members.

## CSC Program Document Contents

The following sections in this document provide more depth on the following areas:

- **Scrum Coach Definition** defines a Scrum coach: what they do and what behaviors they possess.
- **CSC Entry Criteria** describes the experience and skills required to become a CSC.
- **CSC Certification Process** describes the process of certifying a CSC candidate.
- **CSC Renewal Criteria and PDUs** describes the experience, professional development, and community involvement required to maintain CSC status once it has been achieved.
- **CSC Code of Ethics** describes the professional code of conduct that each CSC must abide by.

## **Scrum Coach Competencies and Skills**

A Scrum Coach has been trained as a Certified ScrumMaster or Scrum Product Owner, is an experienced Scrum practitioner, and has the skills required to transform a client\*, helping them to reach their full potential through the use of Scrum. They are expected to have experience and skills in the following areas:

### **Knowledge and Experience in Scrum**

Scrum Coaches are a trusted source of Scrum knowledge and experienced Scrum practitioners. They deeply understand and can clearly articulate the Scrum framework, values, roles, responsibilities and ceremony. They have a broad knowledge about how Scrum relates to the Agile Manifesto and other agile and non-agile processes and methodologies such as Extreme Programming, Lean, and traditional project management practices. They recognize when Scrum is not appropriate framework for a client's needs. They play an active role in the Scrum community through their research, writing, and other contributions.

### **Advisory & Consultancy Skills**

Scrum Coaches advise and consult with a client organization that is using, or is considering using, Scrum. Their advice enhances and speeds the self-discovery process—it should not replace it. They understand and respect the nature of a client-consulting relationship, whether they are internal or external to the organization. They have experience in engaging multiple teams and roles within and across organizations. They can relate and communicate with technical and business roles at various leadership levels.

### **Facilitation Skills**

Scrum Coaches facilitate client adoption, implementation, and learning of Scrum. They facilitate effective and efficient meetings; engage multiple roles and stakeholders in critical discussion and building consensus; and leverage conflict resolution strategies in resolving differences and organizational impediments. They maintain a non-biased, third-person viewpoint in client engagements so they can see multiple sides of conversations. They observe verbal and non-verbal communication and aid isolation of root problems from the exposed symptoms.

### **Agile Leadership Skills**

Scrum Coaches exemplify a servant leadership style. They lead by example and role model situations and behaviors for their clients. They challenge command and control behaviors. They have strong organizational and interpersonal skills, can communicate clearly, and are willing to engage with their clients. They listen more and speak less. They accept and reflect on feedback. They value the ideas and opinions of others. They guide leaders and practitioners in fostering a learning and adaptive environment, participative management, mutual influence, and empowered cross-functional and self-organizing teams.

### **Organizational Development Skills**

Scrum Coaches enhance the skills, resources, and creativity that the client already possesses. They ask powerful questions to guide client discovery and transformation. They recognize that the client learns best through application, not lecture. They are an organizational change agent, understanding the cultural and structural interdependence between the organization and Scrum. They differentiate organizational impediments exposed by Scrum from those caused by it. They value honesty, integrity, and accountability.

### **Professional Development**

A Scrum Coach continuously seeks personal and professional growth through ongoing professional development related to their practice and their client. They crossbreed knowledge and experience with their client from other engagements, coaches, and best practices.

*\* NOTE ON THE DEFINITION OF CLIENT - Throughout this document we refer to a coaching engagement with a client. Given that a Scrum Coach may be an internal employee of a company or an external consultant, a client is any engaged team member, team, stakeholder, or organization that is actively learning or practicing Scrum under the guidance of the coach.*

## **CSC Entry Criteria**

Obtaining a Scrum Coach Certification includes fulfilling requirements in the following areas:

1. Current Scrum Alliance CSP Certification
2. Scrum Coaching Experience, Skills and Competence
3. Contribution to the Scrum Community

### **1. Current Scrum Alliance Certification**

The coach must be a Certified Scrum Practitioner in good standing. A coach must have direct experience with Scrum, either past or present.

### **2. Scrum Coaching Experience, Skills and Competence**

The coach will provide proof of coaching experience and competence through all of the following activities:

- **Client Engagement**

The coach must have demonstrated competence as a mentor to multiple Scrum teams over a period of at least one year and at least 1,500 hours of Scrum coaching within the past 5 years. This experience can be as either an employee or an external consultant and can involve one or more organizations.

- **Letters of Reference**

Two letters of reference are required from individuals who can attest to the candidate's competence as a Scrum Coach and demonstrates the candidate's coaching-client relationship and impact on the client organization. Reference must have personal experience and involvement with the coach while they were performing in a coaching capacity. They may be contacted by the Scrum Alliance for verification of their information.

- **Scrum Coaching Competencies and Skills Assessment**

The coach will demonstrate their competence and experience through a written application consisting of four parts: Coaching Experience, Scrum Knowledge, Coaching Skills and Competencies and a Coaching Assessment. The competency and skills application evaluates the knowledge and application of Scrum of the coaching candidate and will be a primary reference for the review process.

### **3. Contribution to the Scrum Community**

The coach will demonstrate a contribution to the Scrum community during the past three years in one or more of the following ways:

- by participating in a Scrum Gathering, agile conference, or other Scrum-related event
- by serving as an active member of one or more committees or working groups in the Scrum Alliance
- by publishing a book or article on a Scrum-related topic (not including self-publication)
- by serving as a mentor for others in the Scrum Community outside of the coach's organization
- by making significant contributions to shared Scrum knowledge through participation in an active online venue such as a message board, blog or electronic magazine

## **CSC Certification Process**

There are two review stages to becoming a CSC. Stage one is an administrative review to verify compliance to the criteria required to become a CSC. Stage two is a peer review to verify that the content of the supportive application materials demonstrate experience, skills, and competence as a CSC.

### **Accessibility of Process Documentation**

- The candidate is directed to the Scrum Alliance website to review the CSC certification process guidelines, requirements and to download required document templates.

### **Candidate Submission**

- The candidate coach will submit required application documents and a \$100 processing fee that will be applied to first year certificate fee if candidate is approved.
- An applicant will receive notification of application receipt within three business days post submission.

### **Administrative Review**

- The Scrum Alliance will verify all application materials meet the criteria for approval, including the client coaching hours, reference letters, and application.
- If the application does not meet the basic criteria for approval, the Scrum Alliance will notify the applicant with a description of the missing criteria.
- If the application meets the basic criteria, the Scrum Alliance will assure that the content review is processed within the specified timeframe.

### **Content Review**

- Content reviewers are appointed by the Scrum Alliance.
- Content reviewers evaluate the applicant's experience, skills and competencies through the references and application materials provided.
- The content reviewers may contact the applicant or references for further information.
- The content reviewers provide a recommendation as "recommended", or "not recommended until..." with detailed explanations of shortcomings in the application.
- The Scrum Alliance will convene the content reviewers on at least a yearly basis to discuss the review certification process and modify as necessary.

### **Acceptance or Rejection**

- The Scrum Alliance notifies the applicant of their acceptance or rejection, including the specific feedback provided in the administrative or content review.
- An application will receive notification of acceptance or rejection within one month after notification of application receipt.
- Rejected applicants may appeal their result once if they feel the decision was unwarranted and may request another content review.
- An approved candidate submits their certification fee.

## **CSC Renewal Criteria**

Renewing a Scrum Coach Certification includes meeting the following requirements:

### **1. Renewal Period**

The Certified Scrum Coach (CSC) designation must be renewed every three (3) years.

### **2. Professional Development**

A CSC must earn 60 or more Scrum Coach Professional Development Units (PDUs) during the renewal period. *See below for PDU Definitions.*

### **3. Renewal Application**

A CSC must submit a renewal application providing documentation of their ongoing professional experience and development as a coach.

### **4. Renewal Fee**

A CSC is required to pay \$750 per year to retain their certificate.

*If a CSC fails to renew their certification within their renewal period, the CSC designation will be revoked and they may be required to resubmit a new application.*

## **Professional Development Units (PDUs)\***

A minimum of 60 Professional Development Units (PDUs) must be earned across at least three of the following five categories but must include Scrum Coaching. Each category is presented below with the minimum and maximum PDUs available and details on how to obtain PDUs for that category.

1. Scrum Coaching (10 – 30 PDUs)
2. Professional Activities (0 – 20 PDUs)
3. Self-Directed Learning (0 – 10 PDUs)
4. Professional Education (0 – 20 PDUs)
5. Scrum Community Involvement (0 – 10 PDUs)

### **1. Scrum Coaching**

A minimum of 10 PDUs must be earned (with a maximum of 30 PDUs) per renewal cycle in Scrum coaching. 1 PDU is earned for every 100 hours of Scrum Coaching. This means a minimum of 1,000 hours of Scrum coaching during the renewal period of three years is required for renewal.

*Proof of Scrum Coaching will be required as a signed letter from the client indicating the coaching date range and total coaching hours of provided by the coach.*

### **2. Professional Activities**

A maximum of 20 PDUs may be earned by participating in specified professional activities.

- Author or co-author of an article pertaining to Scrum coaching published in a journal – 3 PDUs per article
- Author or co-author a case study pertaining to Scrum coaching experience published on the Scrum Alliance website – 2 PDUs per case study
- Speaker/teacher/moderator on Scrum and/or agile topic at a conference, symposium, workshop, or formal course – 5 PDUs per activity
- Speaker on Scrum related topic at a local Scrum or Agile group meeting – 5 PDUs per activity
- Author or co-author of textbook that pertains to Scrum, agile, or business coaching – 20 PDUs
- Developer of content for a Scrum and/or agile learning program – 5 PDUs per new program

*Documentation of professional activity may be required upon Scrum Alliance audit/request including copies of publications, sample educational materials or course agendas.*

### 3. Self Directed Learning

A maximum 10 PDUs may be earned during a CSC renewal cycle in self-directed learning. Self-directed learning activities are individualized learning projects involving personally conducted research or study. Learning may include informal activities such as discussion or coaching sessions with colleagues, co-workers, clients, or consultants. It may include articles, books, instructional manuals, videos, CD-ROMs, or other material resources.

*Documentation of self-directed learning may be required upon Scrum Alliance audit/request. Coaches must be able to provide evidence supporting their reported learning project.*

### 4. Professional Education

A maximum of 20 PDUs may be earned per renewal cycle through training from Scrum Alliance Certified Scrum Trainers, formal accredited education institutions, other training providers, and software development or coaching conferences. For all providers, one (1) contact hour of learning relevant to Scrum/Agile/Coaching within a structured activity or course equals one (1) PDU.

- **Scrum Alliance Certified Scrum Trainers:** PDUs may be earned by attending educational programs offered by individuals approved by the Scrum Alliance as Certified Scrum Trainers. These individuals adhere to quality criteria established by Scrum Alliance.
- **Formal Accredited Educational Institution:** PDUs may be earned by completing an academic course. Courses must be offered for degree credit and be related to Scrum, agile, or business coaching. One (1) hour of degree credit in a typical 15-week semester earns 15 PDUs. One (1) quarter semester hour (10 weeks) earns 10 PDUs. When only a portion of a course relates to Scrum or agile, PDUs are calculated on a percentage of the overall curriculum focused on Scrum/agile. Each course must be submitted on a separate PDU Reporting Form. Scrum Alliance does not recognize entire degree programs for PDU credits, only individual courses
- **Other Education Service Providers:** Contact hours of Scrum/agile education may be earned by attending relevant educational programs offered by organizations not registered with the Scrum Alliance.
- **Scrum Alliance Gathering and other agile conferences:** Contact hours may be earned by attending conferences focused on agile software development or coaching.

*Documentation may be required upon Scrum Alliance audit/request including registration form, certificate or letter of attendance, and a brochure or course materials outlining the subject matter covered and the qualifications of the instructor/lecturer.*

### 5. Scrum Community Involvement

A maximum of 10 PDUs may be earned per renewal cycle through professional service to a Scrum/agile organization or by providing non-compensated Scrum/agile services to non-employer or non-client customer groups. The volunteer services must meet the definition of a Scrum project.

Examples of qualifying activities and their associated PDU values include the following:

- Serve as an elected officer for a Scrum/agile organization - 2 PDUs per calendar quarter of active participation.
- Serve as a volunteer/appointed committee member for a Scrum/agile organization - 1 PDU per calendar quarter of active participation.
- Provide Scrum/agile related coaching services to a community or charitable group - 1 PDU per calendar quarter. The organization sponsoring the project must be a legally recognized not-for-profit organization.

*Documentation may be required upon Scrum Alliance audit/request including a letter or certificate from the organization served acknowledging the coach for leading project tasks or participating as part of a Scrum project team.*

*\* NOTE: Professional Development Units are referenced from the Project Management Institute (PMI) and remain equivalent in design, although specific definitions were tailored to Scrum.*

## **Scrum Coaching Code of Ethics**

### **Professional Conduct at Large**

1. I will conduct myself in a manner that reflects positively upon the Scrum coaching profession and I will refrain from engaging in conduct or making statements that may negatively impact the public's understanding or acceptance of coaching as a profession.
2. I will not knowingly make any public statements that are untrue or misleading, or make false claims in any written documents relating to Scrum or Scrum coaching.
3. I will respect different approaches to coaching. I will honor the efforts and contributions of others and not misrepresent them as my own.
4. I will accurately create, maintain, store, and dispose of any records of work done in relation to the practice of coaching in a way that promotes confidentiality and complies with any applicable laws.

### **Professional Conduct with Clients**

5. I will construct clear agreements with my clients and will honor all agreements made in the context of professional coaching relationships.
6. I will ensure that, prior to or at the initial session, my coaching client understands the nature of coaching, the bounds of confidentiality, financial arrangements, and other terms of the coaching agreement.
7. I will accurately identify my qualifications, expertise, and experience as a coach.
8. I will not intentionally mislead or make false claims about what my client will receive from the coaching process or from me as their coach.
9. I will not give my clients or prospective clients information or advice I know or believe to be misleading.
10. I will not knowingly exploit any aspect of the coach-client relationship for my personal, professional, or monetary advantage or benefit.
11. I will respect the client's right to terminate coaching at any point during the process. I will be alert to indications that the client is no longer benefiting from our coaching relationship.
12. If I believe the client would be better served by another coach, or by another resource, I will encourage the client to make a change.
13. I will suggest that my clients seek the services of other professionals when deemed appropriate or necessary.

### **Confidentiality/Privacy**

14. I will respect the confidentiality of my client's information, except as otherwise authorized by my client, or as required by law.
15. I will obtain agreement from my clients before releasing their names as clients or references, or any other client identifying information.

### **Conflicts of Interest**

16. I will seek to avoid conflicts between my interests and the interests of my clients.
17. Whenever any actual conflict of interest or the potential for a conflict of interest arises, I will openly disclose it and fully discuss with my client how to deal with it in whatever way best serves my client.

### **Pledge of Ethics**

As a Certified Scrum Coach, I acknowledge and agree to honor my ethical obligations to my coaching clients and colleagues and to the public at large. I pledge to comply with the Scrum Coaching Code of Ethics, to treat people with dignity as independent and equal human beings, and to model these standards with those whom I coach. If I breach this Pledge of Ethics or any part of the Scrum Coaching Code of Ethics, I agree that the Scrum Alliance in its sole discretion may hold me accountable for so doing. I further agree that my accountability to the Scrum Alliance for any breach may include loss of my Scrum Alliance membership and/or my CSC credentials.