



Certified Relocation and Transition Specialist™

Core Competencies

The Relocation & Transition Industry- 5%

- A) Definition: Late Life Transition
- B) Core Services
- C) Professional Alliances
- D) Relevant Statistics
 - i) Demographics
 - ii) Aging Trends
 - iii) Housing
 - iv) Financial

Client Issues in Transition-25%

- A) Stress Factors
 - i) Relocation Stress e.g. transition trauma, adaptation
 - ii) Emotional Stress
 - iii) Financial Stress
 - iv) Physical Stress
- B) Mental Health Factors
 - i) General
 - (a) Loss
 - (b) Depression
 - ii) Dementia
 - (a) identification
 - (b) management
 - iii) Hoarding & Clutter Addiction
 - i) Identification
 - ii) Management
- C) Social Factors
 - i) Family Dynamics
 - ii) Cultural Dynamics
 - iii) Home and Community Based Services
- D) Functional Abilities
 - i) ADLs
 - ii) Chronic Conditions
- E) Care Giving
 - i) Home Care
 - ii) Home Health Care
- F) Housing
 - i) Types of Housing
 - ii) Housing Transition Procedures

Communication-20%

- A) Verbal and Non-Verbal
- B) Overcoming Obstacles
 - i) Identification
 - ii) Establishing Trust
 - iii) Awarding Control
- C) Generational Issues
 - i) Ageism
 - ii) Dignity and Respect
 - iii) Communication
 - (a) Speed
 - (b) Method
 - (c) Mode

Client Home Assessments-15%

- A) Client Intake e.g. Interview, Professionalism
- B) Client Plan
 - i) Transition Assessment/ Home Review
 - ii) Plan Development

Service Spectrum -15%

- A) Space / Floor Planning
- B) RightSizing
- C) Organizing
 - i) Sorting
 - ii) Allocating
 - iii) Purging
- D) Coaching
 - i) Home Sale and Preparation
- E) Managing Tangible Assets
 - i) Home Inventory
 - (a) Identifying Valuables
 - (b) Methodology
 - ii) Household Goods Allocation
 - (a) Sale
 - (b) Donation
 - (c) Disposal
 - iii) Preserving Memories/Honoring Legacy

- F) Relocation
 - i) Packing
 - ii) Transferring
 - iii) Move Management
- G) Age-In-Place
 - i) Concepts
 - ii) Environmental Assessments
 - ii) Consumer Safety

Resettlement-15%

- A) Moving In
- B) Transition Support
 - i) New Environments
 - ii) Interventions
- C) Organizing Home Environment
 - i) Unpack Placement
 - ii) Minimize Change
 - iii) Adaptability and Accessibility

Guidelines for Professional Practice-5%

- A) Service Ethics for At Risk Clients
- B) Marketing Ethics
- C) Scope of Practice
 - i) Licensure and Regulations
 - ii) Professional Liability