Professional School of Psychology

Portfolio Process for Organizational Psychology Doctoral Students

Version 4

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1. INTRODUCTION

The Portfolio process encompasses all educational activities between admissions into the Organizational Psychology doctoral program and the advancement to candidacy (beginning of preparation for dissertation work). Educational activities serve two functions with regard to the Portfolio process: (a) help you acquire competencies associated with each of six roles (competency clusters), and (b) help you document the competencies that they have acquired during the program or possessed prior to entering the School.

How to Use This Book

This book is designed and written for face-to-face training sessions between students who are just beginning their Portfolios and students or faculty who have experience with the Portfolio process. Reading about the Portfolio and understanding what it will look like is much easier when samples Portfolios are reviewed and students are available to discuss their process. The authors encourage you to review this book before your face-to-face session but also please do not be discouraged if it is confusing for you. Once you begin to work with your Portfolio, it will be much easier to understand the instructions contained here.

Purpose of a Portfolio

An Organizational Psychology Doctorate from the Professional School of Psychology (PSP) requires the following:

1. Completion of all necessary coursework with a passing grade;
2. (a) Completion of a 1500 Hour Internship and Comprehensive Exam
   OR,
   (b) Completion of a Portfolio or Learning Record;
3. Completion of a dissertation;
4. Approval and acceptance of all requirements by the PSP Portfolio Advisor.

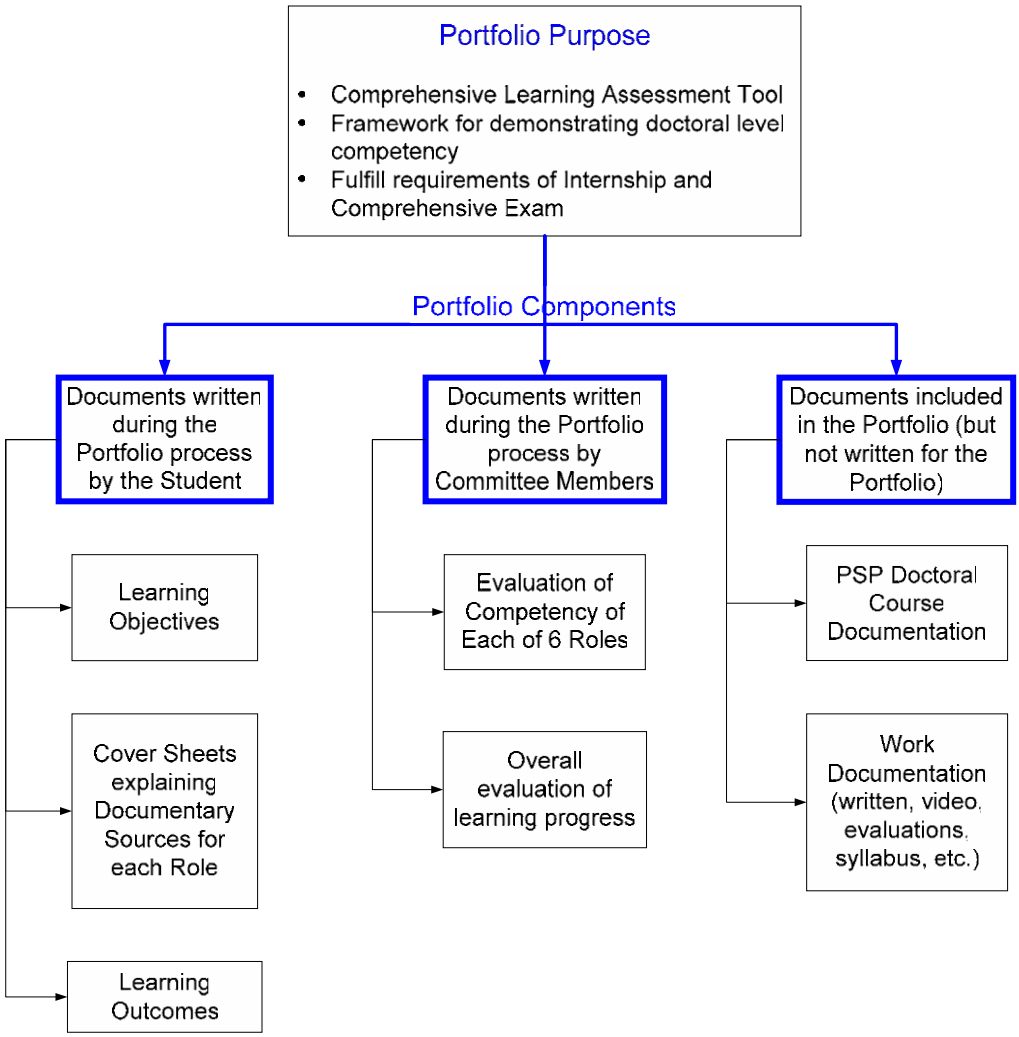
The Portfolio is an option in lieu of comprehensive examinations and the internship. A Portfolio process consists of three components. First, a series of competency categories is established to determine what will be evaluated. Second, a set of documents is developed and collected by you throughout your coursework. Third, your Portfolio Committee reviews and approves the Portfolio.

The purpose of the Portfolio is to:

1. Be a comprehensive learning assessment tool;
2. Demonstrate successful attainment of doctoral level competency;
3. Fulfill a requirement for a doctoral degree.

2. PORTFOLIO PROCESS OVERVIEW

The Portfolio consists of two parts in order to present a comprehensive picture of a student's competency, The first part is material written expressly for the Portfolio. These documents outline the learning objectives and competency role selection rationale, and then a reflective document summarized the progress made and key learnings. The second part of the Portfolio consists of documentary sources with student reflections on the relevance, and evaluations from Committee members to provide additional insight for the student and to assess the Portfolio against the requirements.



3. ROLE OF THE PORTFOLIO COMMITTEE

The Portfolio Committee is constituted by and for each student. The role of the Portfolio Committee is to:

1. Provide different perspectives to guide your learning;
2. Assist in assessing your strengths and areas of potential learning;
3. Challenge your personal assumptions that may otherwise limit your learning;
4. Give final approval and sign off on the Portfolio.

Portfolio Committee Members

Your Portfolio Committee should ideally be selected before making any major decisions about the Portfolio. However, it is also acceptable to assemble a Portfolio and submit it to the Portfolio Committee for review. The Committee consists of a minimum of three people: the student, a person chosen by student (such as a colleague from outside of the school or another student enrolled in a PSP doctoral program) and a PSP faculty member, preferably the designated PSP Portfolio Advisor.

You may have additional members on your Committee, although a maximum of five Committee members is recommended.

4. PERSONAL PORTFOLIO PLAN

Your Portfolio plan is a document that will assist you in the successful completion of your Portfolio and will serve as a guide throughout your doctoral program. The first step is for you to decide on which competencies of six critical organizational roles you want to focus on. The six roles are Teacher, Researcher, Scholar, Leader, Interventionist, and Advocate. The first three roles (teacher, researcher, and scholar) will primarily, although not exclusively, encompass the formal course work taken at PSP. The other three roles (interventionist, leader, and advocate) will primarily, although not exclusively, encompass experiences in the field and formal educational and training experiences outside PSP.

While each of the courses in this program is designed to focus explicitly on developing competency in one or more of these roles, you need to decide which roles will be your personal background roles (Level One), your intermediate interest roles (Level Two), and your primary focus roles (Level Three). This selection will then guide the gathering of assessment documentation for your Portfolio.

Level One

Two of the six roles will be identified as of minimal importance to the student, either because the student has already mastered this cluster of competencies or because this role will be of less relevance to the student in the near future than that of the other roles. These two roles will be labeled a Level One Competency Cluster. Background roles are those that hold little opportunity for growth for you. While you will need to demonstrate competency in these roles, it may be that your experience in organizations or other practice has already given you the opportunity to develop adequate competency in these roles.

Level Two

Two of the six roles will be identified as of moderate importance to you because this role offers some challenge or because it is likely to be of some importance in the near future. These two roles will be labeled a Level Two Competency Cluster. Intermediate focus roles, while still important to you, are roles that, for whatever reason, hold less growth potential for you. It may be that you have acted in these roles in the past, or it may be that you are familiar with these roles through other life experiences.

Level Three

Two of the roles will be identified as of greatest importance to you either because you find this cluster of competencies to be a great challenge or because these roles may be of great relevance in the near future. These two roles will be labeled a Level Three Competency Cluster. Your primary focus roles are those roles that you find most compelling and that hold the most promise for your personal and professional growth. These are the roles that you will focus on when assessing your progress and reflecting on any mid-course corrections that you might wish to make during the program. Level Three roles also require more documentation sources than Level One or Level Two roles.

Descriptions of each role follows:

Teacher

In the role of teacher, an influential member of organizations must be knowledgeable about learning theory, learning styles, adult development, cultural factors, alternative learning strategies, and assessment processes. The teacher must also be skillful in performing reflective practice, group facilitation and appreciative inquiry.

Researcher

Researchers in organizations need to be knowledgeable about the scientific method as applied to organizational work, as well as both qualitative methodology and computer-based research technologies. They also need to acquire skills related to interpretation, writing, analyzing, evaluating, hypothesizing, focusing, and organizing information.

Scholar

The scholar requires knowledge about databases, multi-cultural frameworks, and sources of information, philosophy, and epistemology. The requisite skills of scholarship include synthesis, modeling, critical thinking, evaluation, hermeneutics, reframing, application, and inquiry.

Leader

Those who wish to influence organizations must be knowledgeable about the dynamics of complex systems and institutional history and culture. They must also possess the skills of facilitation, strategic, tactical and contingency planning, systems thinking, team building, and problem solving. Leaders must know how to clarify and articulate institutional vision, manage conflict, make decisions, and design temporary systems that provide both challenge and support.

Interventionist

Whether one is serving in a role of employee or manager, the interventionist should acquire knowledge in the following areas: change theory, organizational, group and individual behavior, models of intervention (particularly the processes of unfreezing, change/learning and re-freezing) and the nature of defensive routines. Interventionists should also have acquired related consultation skills: contracting and re-contracting, data gathering, analysis and presentation, planning for change, and closing a consultation with adequate reflection.

Advocate

Organizational leaders often overlook this sixth role. To be a successful advocate, one must be knowledgeable about community development, political systems, sources and nature of power, diffusion of innovation, alternative frames of reference, and the theories and strategies of large-scale change. Complimentary skills include clarifying values, negotiating, reflecting, communication, leveraging, persuading, networking, and building alliances.

5. SELECTING FOCUS ROLES

The next step in building your personal Portfolio plan is to select your primary focus, intermediate focus, and background roles. The questions below are starting points to help you begin this process.

1. Which role is the most compelling for you? Which is the role that you would like to learn about most? Which role represents the most growth for you? This would be your primary focus role (#1).
2. Which role is the least compelling for you? With which role are you most familiar? This would be your background role (#6).
3. Which of the remaining roles draws your interest the most? Which of the remaining roles do you know the least about? If, when working in an organization, you chose to accept one of the remaining roles, which would cause you to stretch the most in fulfilling its requirements? This could be your second primary focus role (#2).
4. Of the remaining roles, which seems the most familiar to you? Which of the remaining roles have you played often? Which of the remaining roles is least interesting to you? This could be another background focus role for you (#5).
5. List the two roles that you have not yet selected for your intermediate focus roles (#3 and #4).

Primary focus roles will require detailed assessment documentation in your Portfolio. Intermediate focus roles will require less detailed assessment documentation in your Portfolio. Background roles will only require low-level assessment documentation in your Portfolio.

Suggested Course Role Focus

It might be helpful when collecting documentary sources to do so within a course context. The guide for the focus roles emphasized in the courses is provided in Appendix A.

6. PORTFOLIO STRUCTURE

Your personal Portfolio should be structured so that each role is documented for the level of emphasis determined by the student for competency. Appendix B may serve as an example in planning the level of effort required to demonstrate competency at each level. Students may either plan ahead what kind of documentary source they would like to produce in a given course, or students may choose to simply identify ~~b~~est work" samples as they are done. Whatever method a student chooses, at the end of the program, the Portfolio must have the required number and types of documentation for the courses.

Portfolio Entries

As you work with your Committee to set documentation requirements, have them consider what types of documentation are available and produced as a natural result of your work, both in the work place and through school. Consider the purpose for which the documentation is to be collected and its suitability for that purpose. Ideally, Portfolio documentation is something that arises as a natural byproduct of your efforts, not something separate that is done outside of the moment for the sole purpose of meeting Portfolio requirements. The Portfolio's purpose is to organize meaningful documentation in a useful structure, not to create ~~b~~usy work" at the last minute.

Although most sources are written documents of some kind, the documentary source types are distinguished by the type of experience represented. One documentary source may include several documents depending on the competency and level of the role. The documentary source types are:

1. Topical Paper: A paper focused on a specific topic to explore, compare and contrast, postulate, explain or summarize a body of knowledge.
2. Action or Experiential: A body of knowledge gained through an activity or experience that can be demonstrated through various means such as a video or audio tape, an evaluation, a paper, reports, proposals, analytical documents, etc. Evaluations from participants are often part of these source types.
3. Presentation and Participation: A demonstrated ability to educate and influence others using organizational psychology expertise through a video or audio tape, presentation materials, training curriculum, etc. Evaluations from participants are often important for these source types.
4. Reflection and After Action: A retrospective analysis of previous activities or experiences that focuses on lessons learned, what worked, or personal meaning of those activities through video or audio tape, artistic expression, written paper, etc.

The Portfolio will contain a minimum of fourteen documentary sources, two sources for Level One and Two Roles, and three sources for each Level Three role. The type of source will depend on the competency clusters of the student. Table 1: Roles and Documentary Sources is meant to help clarify the type and number of sources depending upon the level of a given role.

Table 1. Roles and Documentary Sources

Role	Level 0 *(required regardless of Focus Roles selected)*	One Source to document Level 1, 2, or 3 attainment	Total Portfolio Minimum Sources
Teacher	One Source Related to Coursework	Example: • Lesson plan, teaching materials • Paper documenting the teaching process including student evaluations	2
Researcher	One Source Related to Coursework	Example: • Examination copy • Research article copy • Additional coursework Sample	2
Scholar	One Source Related to Coursework	Example: • Additional coursework Sample • Examination copy • Article copy	2
Interventionist	One Source Related to Coursework	Example: • Field work documentation (products) and outcome evalations • Paper discussing field work	2
Leader	One Source Related to Coursework	Example: • Field work documentation (products) and outcome evaluations • Paper discussing field work	2
Advocate	One Source Related to Coursework	Example: • Field work documentation (products) and outcome evaluations • Paper discussing field work	2
Total Minimum Documentary Sources			**14** Consisting of: 4 Level 1 Sources 4 Level 2 Sources 6 Level 3 Sources

The important thing to remember when building a Portfolio is the purpose of the Portfolio—a Portfolio serves to help students acquire and document competency! Students can include more than 14 documentary sources and the nature of the sources will naturally vary depending upon the focus and activities chosen. However, a well-rounded Portfolio should contain a sampling of each documentary source. Further detail on documentary sources and level evaluation is contained in Appendix C.

7. PROCESS FOR PORTFOLIO REVIEW

Once you have developed your personal Portfolio plan, you will want your Committee to review it. Ask your Committee members to review the plan and provide comments to you. During this review process, you may want the Committee's help in probing your assumptions around organizational roles, the nature of your strengths, your selection of documentation and activities, or other elements of the Portfolio plan. They should also help you assess the structure and proposed content of your Portfolio: Does it provide a useful format for identifying, reviewing, assessing, and sharing your goals and accomplishments throughout the program? Does it stretch you? Is it appreciative or deficit based? Does it promote building from your strengths? Conscientious and appreciatively constructive Committee comments can be essential in building a Portfolio with generative properties that support your learning within and beyond your doctoral work. Additional instructions for your Committee members are in Appendix D.

For many, it is interesting to maintain a history of Portfolio changes as a part of the Portfolio. Reviewing the history once the Portfolio is completed can be a rare and valuable opportunity to reflect on changing personal perspective and understanding over time. Understanding this yourself will enable you to better help others in any of the six roles you take upon yourself.

Each documentary source will be assessed in the following categories, and will be evaluated on the level of work (Level 1, 2, 3). At the end of the program, your Committee will review the final Portfolio to ensure completeness.

Assessment Categories

Technical skills: Having practical knowledge in a particular field that distinguishes a person by the characteristic of specialization. Field experience distinguished the professional degree of Psy.D. from the Ph. D., therefore, demonstration of technical skills is important to competency attainment. Application of theory to practice distinguishes doctoral level work

Information integration: Incorporation of knowledge obtained from investigation, study, or instruction into an action or other construct. Application of theory to practice distinguishes doctoral level work.

New idea development and creation: The act of making, inventing, or producing an original work.

Critical thinking and analysis: A method of resolving complex expressions and concepts into basic ones through the application of logic and reasoning.

Research: Investigation or experimentation aimed at discovering and interpreting facts, revision of accepted theories or laws in the light of new facts, or practical application of such new or revised theories or laws.

Knowledge of Organizational Psychology

The Portfolio sources should reflect understanding of the body of knowledge presented in the doctoral program. The student should assess their work using the assessment categories, and considering the three knowledge bases of the Doctoral program.

1. Firm grounding in the core sub-disciplines of psychology-perception, cognition and learning, physiology and neuropsychology, personality, social and cross-cultural, as well as industrial and organizational psychology.
2. Particular focus on the sub-discipline of social/cognitive psychology. Understanding the ways in which one's perceptions, attitudes, values, and behaviors interact with and help determine social structures, dynamics, and culture.
3. Examination of the American, British, and Continental perspectives of organizational psychology.

8. COMPLETED PORTFOLIO

The final Portfolio should be a complete picture of the student's work and learning and evaluation by the Committee members. The following format is recommended in order to cover the material needed for a comprehensive Portfolio. The student may modify this format as long as the intent and scope of the documentation is accomplished.

I. Introduction

- Background information about the student
- Why the student choose this course of study
- Background letter to the school.
- Personal learning objectives

II. Focus Roles

- Discussion of selection of focus roles

III. Personal Learning Summary

- How did the student grow in the roles? Reflect on the beginning and end of the learning process. How is theory used to inform practice?
- What does the student consider to be his/her best work?
- What was learned through the Portfolio Process?
- What was the biggest surprise or disappointment that surfaced through the Portfolio Process?

IV. Committee Member Summary

- Overall comments about the student, learning, etc.

V. Documentary Sources

- A summary sheet of levels, sources, and types
- A Documentary Source form will accompany each documentary source. Grouped by Section (Level 1, 2, 3).
- A Documentary Source Review & Approval Form is required from two Committee Members (PSP Faculty and other committee member) for each Role.

Several forms are provided in Appendix E to assist you in organizing and assembling your Portfolio.

APPENDIX A: GUIDE FOR FOCUS ROLES

Table 2. Guide for Focus Roles

Courses	Roles					
	Teacher	Researcher	Scholar	Leader	Interventionist	Advocate
Personality Theory			9		9	
Behavioral Neurobiology					9	
Social Bases for Behavior					9	9
Cognitive Bases of Behavior					9	
Research Design & Data Analysis I		9	9			
Research Design & Data Analysis II		9				
Research Design & Data Analysis III		9				
Supervised Pre-Doctoral Internship			9			
Theoretical Foundations: Individuals		9	9	9		
Theoretical Foundations: Groups		9	9	9		9
Theoretical Foundations: Organizations				9		9
Attitude Theory	9				9	9
Decision Theory				9	9	
Measurement and Assessment: Individuals	9				9	
Measurement and Assessment: Groups	9			9	9	
Measurement and Assessment: Organizations	9			9	9	9
Interventions: Individuals	9				9	
Interventions: Groups					9	9
Interventions: Organizations					9	9
Organizational Case Conference	9					
Adult Learning	9					
Dissertation Project Design		9	9			
Executive Coaching Program	9				9	

APPENDIX B: ROLE DOCUMENTATION

This chart serves as an example of the type of documentation that may be included in the Portfolio:

Table 3. Role Documentation

Role	Level 0 *(required regardless of Focus Roles selected)*	Level 1	Level 2	Level 3
Teacher	Complete Course Work	Teaching Assistantship or Presenter in one PSP graduate level course	Co-teach a PSP course ** Conduct a staff training in an organization	Design and teach a Mini-Course/Workshop (e.g. January Intercession, Summer Institute, Continuing Education Program)
Researcher	Complete Course Work	Complete Course Work	Pass a Research Comprehensive Exam	Submit a Research Based Article (e.g. report on original findings) for publication.
Scholar	Complete Course Work	Complete Course Work	Pass Scholarship Comprehensive Exam	Submit scholarship-based article (e.g. synthesis of existing research) for publication.
Interventionist	Complete Course Work	Complete 250 hours of field experience (within own organization); complete case conference (reflective practice).	Complete 500 hours of field experience (within own organization or another organization) and case conference. **	Develop a comprehensive methodology for an intervention within an organization. Utilize the model at least once, write a case study and present it to a class.
Leader	Complete Course Work	Document an experience when you were an effective leader. Discuss insights, what worked, and what you would change.	Complete 500 hours of field experience and case conference. **	Compete 750 hours of field experience, case conference, and 25-hour program outside of PSP focusing on personal and or professional growth.
Advocate	Complete Course Work	Complete 250 hours of field experience and case conference.	Work with a consultant, trainer or coach as a shadow. Document what you saw and learned. Present it to a class. **	Complete 750 hours of field experience, case conference, and 25-hour program outside of PSP focusing on personal and/or professional growth.

** Participant/client evaluations recommended

APPENDIX C: DOCUMENTARY SOURCES

1. TOPICAL PAPER DOCUMENTARY SOURCE

Table 4. Topical Paper Documentary Sources

Documentation Sources	Topical Paper
Definition	Writing of some kind is a part of every course. Writing may be reflective, analytical, creative, or reference. The research involved in writing includes a diligent search to collect information about a particular subject, or scientific or scholarly investigation of a subject.
Level 1	Level 1 writing level includes having the appropriate content, writing to the audience, being concise and clear, and using correct spelling, grammar, format and punctuation. Students generally are required to follow the standard format for editing. The instructor generally assigns the topics. Integration is generally incidental unless specifically requested by the instructor. Research at this level includes efficient use of libraries including books, publications and other media, and use of the Internet.
Level 2	In addition, at Level 2, additional emphasis is on editing skills to improve content. Topics are sometimes assigned and frequently developed independently or through collaboration with the instructor. At Level 2, writing includes the development of a hypothesis, and expansion into the argument or persuasion. Research at Level 2 includes obtaining information through surveys and interviews, and projects involving team research. The paper should be a contribution to professional organizational psychology potentially publishable in a professional journal.
Level 3	Broad approach must be taken to questions to develop a very strong understanding of the field. Topics are frequently developed from a concept drawn from the material or are entirely new topics which evolve from research. Integration skills include reflection on material, application of material, and comparing and contrasting material. Candidates are encouraged to collaborate with others as part of a research project. The paper should be a contribution to professional organizational psychology, which should be publishable in book form.

2. ACTION/EXPERIENTIAL DOCUMENTARY SOURCE

Table 5. Action/Experiential Documentary Source

Documentation Sources	Action / Experiential
Definition	Action is a vigorous, productive, or exciting activity in a particular field, area, or group. By participating in an action, one has a part or share in something. Experiential actions relate to, derive from, or provide experience.
Level 1	At Level 1, students should be able to integrate their learning with others in a formal project valuing other points of view and encouraging equal participation.
Level 2	In addition, at Level 2, candidates should possess the ability to apply concepts to situations and provide leadership by directing resources. Participant/client evaluations are important sources for Level 2 work.
Level 3	In addition, at Level 3, candidates should have demonstrated an aptitude for, and commitment to developing interpersonal skills (empathy, respect for others, personal relatedness), appreciation of cultural and individual diversity, psychological health and self-awareness, intellectual curiosity and flexibility, and personal integrity and honesty. Participant/client evaluations are important sources for Level 3 work. Flexibility is needed to think about projects from the perspective of several disciplines and to be able to manage multiple projects at one time.

3. PRESENTATION/PARTICIPATION DOCUMENTARY SOURCE

Table 6. Presentation/Participation Documentary Source

Documentation Sources	Presentation / Participation
Definition	Presentation is an application of perception, cognition, or memory. Presentation skills are important for leaders, interventionists, and advocates. Training develops individuals through instruction, discipline, or drill to make fit, qualified, or proficient. Subject matter can be new or information that is already known can be reinforced. Presentation requires planning to devise or project the realization or achievement of a program.
Level 1	At Level 1, the presenter needs to be able to prepare, organize and present material to small groups or classes.
Level 2	In addition, at Level 2, presenting means content management, knowledge of presentation tools, visual materials preparation, public speaking skills, and audience management skills. Participant/client evaluations are important sources for Level 2 work.
Level 3	In addition, at Level 3, the presenter must understand how the business works. Explain their discipline to non-specialists to gain their support, understand the business impact of the work. Participant/client evaluations are important sources for Level 3 work. Assessment of needs and applying the appropriate interventions and instruments. Understanding the ways in which one's perceptions, attitudes, values, and behaviors interact with and help determine social structures, dynamics, and culture prepares students to help solve elusive conceptual and strategic problems facing most contemporary, postmodern organizations.

4. REFLECTIVE/AFTER ACTION DOCUMENTATION SOURCE

Table 7. Reflective/After Action Documentation Source

Documentation Sources	Reflection / After Action
Definition	Reflection is a thought, idea, or opinion formed or a remark made because of meditation, a consideration of some subject matter, idea, or purpose.
Level 1	Reflection at Level 1 involves supplementing class material with outside readings, discussions or observations and reflecting alone or with others on the significance of the new learning.
Level 2	In addition, reflection at the Level 2 involves grounding in the core disciplines of the candidate's major integrated with independent study to engage in small or large-group reflection. Working toward developing an understanding in the core sub-disciplines of psychology - perception, cognition and learning, physiology and neuropsychology, personality, social and cross-cultural, industrial and organizational psychology. Ability to reflect and perform a follow-up analysis involving designing and conducting a critical review.
Level 3	In addition, at Level 3, the candidate must possess a firm grounding in the core sub-disciplines of psychology - perception, cognition and learning, physiology and neuropsychology, personality, social and cross-cultural, industrial and organizational psychology. Investigation or experimentation aimed at the discovery and interpretation of facts, revision of accepted theories or laws in the light of new facts, or practical application of such new or revised theories or laws. An important perspective for doctoral students in this field is a probing analysis of American, British, and Continental perspectives of organizational psychology, given the growing globalization of American life. Performing reflective analysis sufficient to apply the concept to second-order learning with individuals, teams or organizations.

APPENDIX D: INSTRUCTIONS TO PORTFOLIO COMMITTEE MEMBERS

The role of the Portfolio Committee Members in reviewing Portfolio entries and documentary sources is to provide evaluative feedback of the source based on the criteria outlined in the Portfolio. Please review the entries in preparation for answering the following questions:

- Do the individual documentary sources meet the competency level of the role?
- Do all the sources as an aggregate demonstrate competency of the role at the level submitted?

Please note that:

- Any comments written directly on the source are for student reflection only and will not necessarily become part of the final Portfolio.

Committee members should write comments to be included in the final Portfolio on the Approval Form. If evaluation feedback includes the need to augment documentary sources or other Portfolio documents, the student is then responsible for incorporating all suggestions and edits required to gain approval of all Portfolio Committee Members.

APPENDIX E: PORTFOLIO FORMS

The following forms and their suggested use are included in this Appendix:

1. **Documentary Source Cover Form** is used in front of each Portfolio entry to indicate the competency role and level with a brief description as to why you chose to include this documentary source in your Portfolio.
2. **Focus Role Review and Approval Form** is for the Portfolio Committee Members to evaluate each focus role at the appropriate level (1,2,3).
3. The **Documentary Source Summary Instructions** explains how to use the Documentary Source Summary Form.
4. The **Documentary Source Summary Form** serves as a summary of the work contained in the Portfolio.
5. The **Student Check List** is provided as an organizational tool.

1. DOCUMENTARY SOURCE COVER FORM

Documentary Source Title: _____

Student: _____

(May be deleted from form in Portfolio since all work will be from one student.)

Competency: _____ **Level:** _____

Documentary Source Type:

- O Topical Paper
- O Action or Experiential
- O Presentation and Participation
- O Reflection and After Action

Description:

Summary (why selected and key learning):

2. FOCUS ROLE REVIEW AND APPROVAL FORM

Documentary Source Title: _____

Student: _____

Reviewer: _____

(May be deleted from form in Portfolio since all work will be from one student.)

Competency: _____ **Level:** _____

Documentary Source Type (s) (check or delete all but applicable one)

- O Topical Paper
- O Action or Experiential
- O Presentation and Participation
- O Reflection and After Action

Assessment Category	Comments	Assessed Level		
		1	2	3
Technical Skills				
Information Integration				
New Idea Development				
Critical Analysis				
Research				

Reviewed By: _____ **Date:** _____

Approved? **Yes** O **No** O

Comments: _____

_____

3. DOCUMENTARY SOURCE SUMMARY INSTRUCTIONS

The following table serves as a summary of the work contained in the Portfolio. The focus level is indicated in the first column. The second column indicates the competency roles that have been selected for each level. The following four columns indicate the level of the work completed. One documentary source is provided for Level 0. Other documentary source(s) is/are selected for Levels 1, 2 and/or 3.

Level 0 documentary sources include the documentary source title, documentary source type, and the course in which the work was completed. Level 1 – 3 documentary sources don't require a course, because much of the work will be preformed outside of a classroom setting; only a documentary source title and type are required. The gold shading indicates the minimum number of cells that must be completed with a documentary source at the indicated level of competency. Additional work is encouraged to document the student's brilliance.

The form is used by deleting all but the needed information, and adding documentary source titles. Table 8 on the following six pages contains the documentation form to be used when summarizing the work contained in the Portfolio.

4. DOCUMENTARY SOURCE SUMMARY FORM

Table 8. Documentary Source Summary Form

Focus Level	Competency	Level 0 (Courses)	Work Level 1	Work Level 2	Work Level 3
3	**Teacher** **Researcher** **Scholar** **Interventionist** **Leader** **Advocate**	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action **Class:** Attitude Theory Individual Assessment Group Assessment Org Assessment Individual Intervention Org Case Conference Adult Learning Executive Coaching	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action

Focus Level	Competency	Level 0 (Courses)	Work Level 1	Work Level 2	Work Level 3
3	**Teacher** **Researcher** **Scholar** **Interventionist** **Leader** **Advocate**	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action **Class:** Personality Theory Behavioral Neurobiology Social Basis of Behavior Cognitive Basis of Behavior Attitude Theory Decision Theory Individual Assessment Group Assessment Organizational Assessment Individual Intervention Group Intervention Organizational Intervention Executive Coaching	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action

Focus Level	Competency	Level 0 (Courses)	Work Level 1	Work Level 2	Work Level 3
2	**Teacher** **Researcher** **Scholar** **Interventionist** **Leader** **Advocate**	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action **Class:** Research Design I Research Design II Research Design III Individual Theory Group Theory Dissertation Project Design	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action

Focus Level	Competency	Level 0 (Courses)	Work Level 1	Work Level 2	Work Level 3
2	**Teacher** **Researcher** **Scholar** **Interventionist** **Leader** **Advocate**	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action **Class:** Social Basis of Behavior Group Theory Organizational Theory Attitude Theory Organizational Assessment Group Intervention Organizational Intervention	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action

Focus Level	Competency	Level 0 (Courses)	Work Level 1	Work Level 2	Work Level 3
1	**Teacher** **Researcher** **Scholar** **Interventionist** **Leader** **Advocate**	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action **Class:** Personality Theory Cognitive Basis of Behavior Research Design I Individual Theory Group Theory Dissertation Project Design	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action

Focus Level	Competency	Level 0 (Courses)	Work Level 1	Work Level 2	Work Level 3
1	**Teacher** **Researcher** **Scholar** **Interventionist** **Leader** **Advocate**	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action **Class:** Individual Theory Group Theory Organizational Theory Decision Theory Group Assessment Organizational Assessment	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action	**Title:** **Documentary Source Type:** Topical Paper Action or Experiential Presentation/ Participation Reflection/After Action

5. STUDENT PORTFOLIO

1. Introduction
   - O Background information about the student
   - O Why did the student choose this course of study?
   - O Background letter to the school
   - O Personal learning objectives
2. Focus Roles
   - O Discussion of selection of focus roles
3. Personal Learning Summary
   - O What areas did the student grow in? Reflect on competency within roles & theory application.
   - O Best work?
   - O Process of doing the Portfolio.
   - O Biggest surprise/disappointment?
4. Committee Member Summary
   - O Committee Member 1: Any overall comments about the student, learning, etc.
   - O Committee Member 2: Any overall comments about the student, learning, etc.
5. Documentary Sources

Level 3: Focus Role: _____

- O Approval Form 1
- O Approval Form 2
- O Cover
- O Source 1 (Level 0)
- O Source 2 (Level 3)
- O Source 3 (Level 3)

Level 3: Focus Role: _____

- O Approval Form 1
- O Approval Form 2
- O Cover
- O Source 1 (Level 0)
- O Source 2 (Level 3)

CHECK LIST

- O Source 3 (Level 3)

Level 2: Focus Role: _____

- O Approval Form 1
- O Approval Form 2
- O Cover
- O Source 5 (Level 0)
- O Source 6 (Level 2)

Level 2: Focus Role:_____

- O Approval Form 1
- O Approval Form 2
- O Cover
- O Source 7 (Level 0)
- O Source 8 (Level 2)

Level 1: Focus Role:_____

- O Approval Form 1
- O Approval Form 2
- O Cover
- O Source 9 (Level 0)
- O Source 10 (Level 1)

Level 1: Focus Role: _____

- O Approval Form 1
- O Approval Form 2
- O Cover
- O Source 11 (Level 0)
- O Source 12 (Level 1)

Focus Roles: Teacher, Interventionist, Leader, Scholar, Researcher, Advocate.