



THE PROFESSIONAL SCHOOL OF  
PSYCHOLOGY

PORTFOLIO MANUAL FOR DOCTORAL  
STUDENTS  
VERSION 8.0

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## Part A: Portfolio Manual

### Introduction

The Portfolio process encompasses all educational activities between admissions into the Organizational and Clinical 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) to help you, the student, acquire competencies associated with each of six roles (competency clusters), and (b) to help you document the competencies acquired during the program or that you possessed prior to entering the School.

### How to Use This Manual

This manual 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 manual 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.

[Insert text about worksheets and process guides]

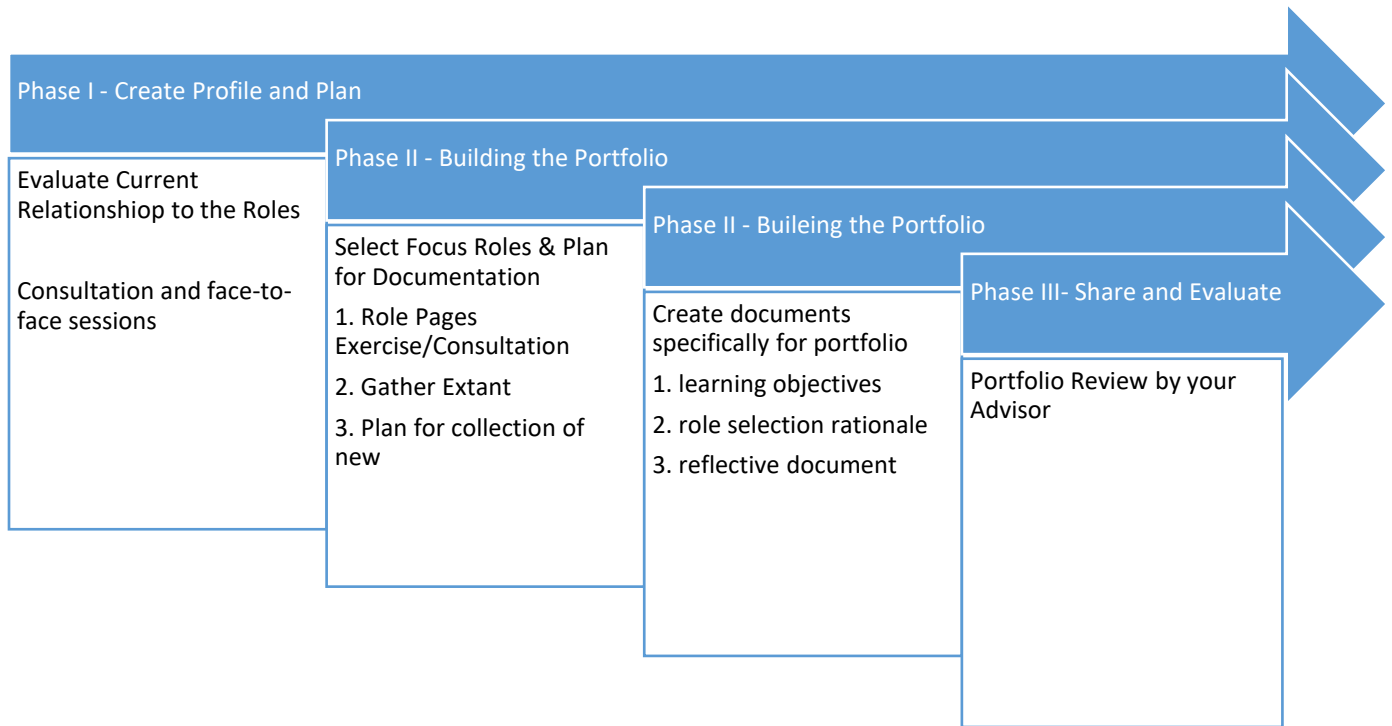
### Purpose of a Portfolio

The Portfolio is an option in lieu of completion of a formal supervised 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 Advisor 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.

## Portfolio Process Overview



The Portfolio consists of two parts, which represent a comprehensive picture of a student's competencies. The first part are documents written expressly for the Portfolio. These documents outline the learning objectives and competency role selection rationale, and then a reflective document summarizing the progress made and key learnings. The second part of the Portfolio consists of documentary sources with student reflections on the relevance of each document to the particular role being assessed by the portfolio advisor.

### Part A

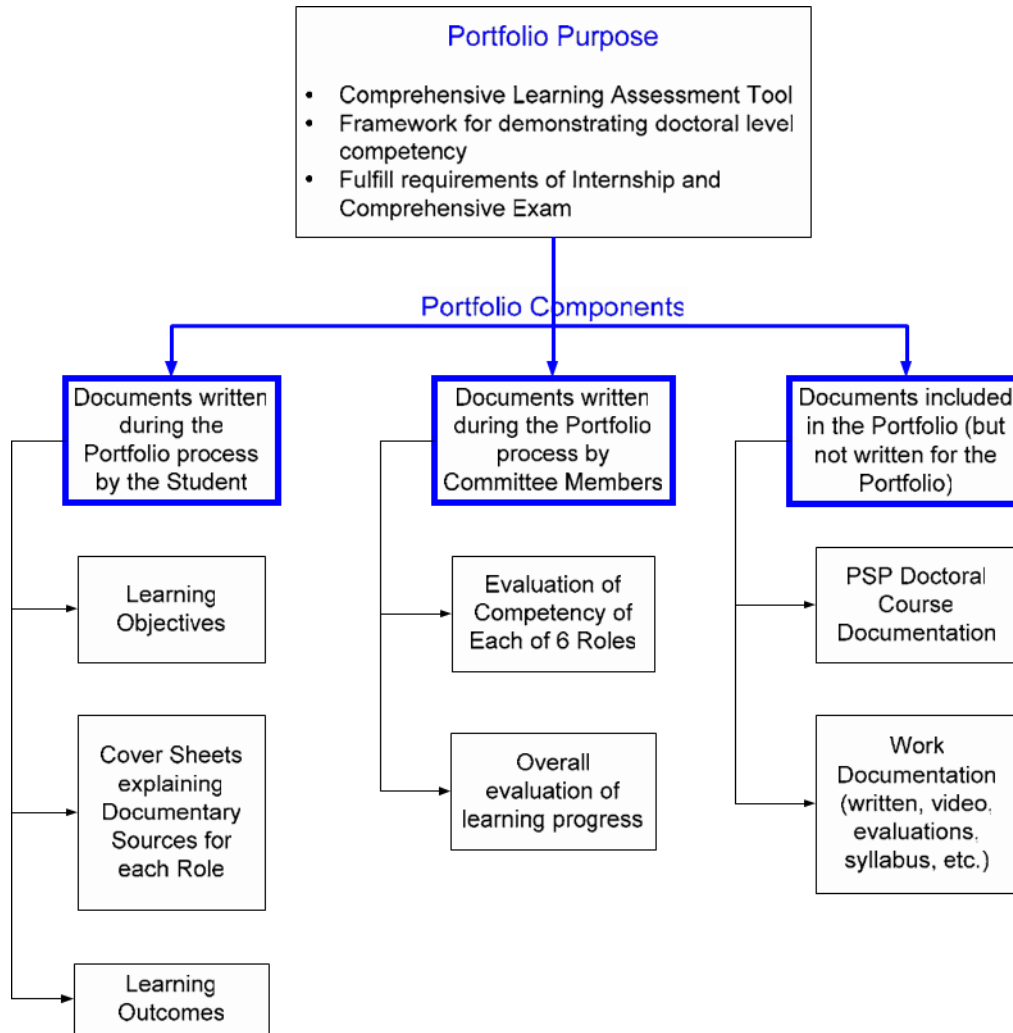


- Learning Objectives (template)
- Role selection Rationale (include role pages)
- Reflective Document

### Part B



- Documentation for competencies
  - Summary (template)
  - source
  - Location



## Role of the Portfolio Advisor [needs more information on parameters]

The Portfolio Advisor is selected by each student in consultation with Dean of the Student's program. The role of the Portfolio Advisor 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.

## 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 and Clinical 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.

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 need to be knowledgeable about the scientific method as applied to Organizational and Clinical 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, 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 and Clinical, 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 and Clinical 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.

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.

[information about matching courses with competencies/roles]

#### 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

## Selecting Focus Roles

The next step in building your personal Portfolio plan is to select your primary focus, intermediate focus, and background roles. We suggest you skip ahead to the role pages/sheets, and fill them out first, to focus your thinking about your relationship to the roles and competencies. 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).
1. 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.

Role Page: Teacher

Focus: Primarily formal course work at PSP

Competencies Assessed for this Role:  
[need to list]

Prior Experience with this role:

Context – when did you fulfil this role? <input type="checkbox"/> N/A	Cursory	Intermediate	In-Depth
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Future Relevance

Context – In what contexts can you see yourself fulfilling this role in the (near or distant future) <input type="checkbox"/> N/A	Near/ Distant	Cursory	Intermediate	In-Depth
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Key Points of Understanding:

	Current Degree of Understanding or Familiarity (1 low)	Degree of Interest or Future Relevance
Learning Theory	1 2 3 4 5 6	1 2 3 4 5 6
Learning Styles	1 2 3 4 5 6	1 2 3 4 5 6
Adult Development	1 2 3 4 5 6	1 2 3 4 5 6
Cultural Factors and Competency	1 2 3 4 5 6	1 2 3 4 5 6
Alternative Learning Models and Strategies	1 2 3 4 5 6	1 2 3 4 5 6
Assessment	1 2 3 4 5 6	1 2 3 4 5 6

Key Skills

	Current Skill Level (1 low)	Degree of Interest or Future Relevance
Reflective Practice	1 2 3 4 5 6	1 2 3 4 5 6
Group Facilitation	1 2 3 4 5 6	1 2 3 4 5 6
Appreciative Inquiry	1 2 3 4 5 6	1 2 3 4 5 6

How compelling is this role to you, after having gone through this process? 1 2 3 4 5 6

Where would you put this role in your personal plan?                      Level 1                      Level 2                      Level 3

Preliminary Documentation – What documentation do you already have for this role?

Source	Format

Role Page: Researcher

Focus: Primarily formal course work at PSP

Competencies Assessed for this Role:  
[need to list]

Prior Experience with this role:

Context – when did you fulfil this role? <input type="checkbox"/> N/A	Cursory	Intermediate	In-Depth
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Future Relevance

Context – In what contexts can you see yourself fulfilling this role in the (near or distant future) <input type="checkbox"/> N/A	Near/ Distant	Cursory	Intermediate	In-Depth
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Key Points of Understanding:

	Current Degree of Understanding or Familiarity (1 low)	Degree of Interest or Future Relevance
Scientific Method	1 2 3 4 5 6	1 2 3 4 5 6
Qualitative methodology	1 2 3 4 5 6	1 2 3 4 5 6
Computer-based research	1 2 3 4 5 6	1 2 3 4 5 6

Key Skills

	Current Skill Level (1 low)	Degree of Interest or Future Relevance
Interpretation	1 2 3 4 5 6	1 2 3 4 5 6
Writing	1 2 3 4 5 6	1 2 3 4 5 6
Analyzing, Hypothesizing	1 2 3 4 5 6	1 2 3 4 5 6
Evaluation	1 2 3 4 5 6	1 2 3 4 5 6
Organizing information	1 2 3 4 5 6	1 2 3 4 5 6
Focusing	1 2 3 4 5 6	1 2 3 4 5 6

How compelling is this role to you, after having gone through this process? 1 2 3 4 5 6

Where would you put this role in your personal plan? Level 1 Level 2 Level 3

Preliminary Documentation – What documentation do you already have for this role?

Source	Format

Role Page: Scholar

Focus: Primarily formal course work at PSP

Competencies Assessed for this Role:  
[need to list]

Prior Experience with this role:

Context – when did you fulfil this role? <input type="checkbox"/> N/A	Cursory	Intermediate	In-Depth
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Future Relevance

Context – In what contexts can you see yourself fulfilling this role in the (near or distant future) <input type="checkbox"/> N/A	Near/ Distant	Cursory	Intermediate	In-Depth
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Key Points of Understanding:

	Current Degree of Understanding or Familiarity (1 low)	Degree of Interest or Future Relevance
Data	1 2 3 4 5 6	1 2 3 4 5 6
Multi-cultural frameworks	1 2 3 4 5 6	1 2 3 4 5 6
Sources of information	1 2 3 4 5 6	1 2 3 4 5 6
Philosophy	1 2 3 4 5 6	1 2 3 4 5 6
Epistemology	1 2 3 4 5 6	1 2 3 4 5 6

Key Skills

	Current Skill Level (1 low)	Degree of Interest or Future Relevance
Synthesis	1 2 3 4 5 6	1 2 3 4 5 6
Modeling	1 2 3 4 5 6	1 2 3 4 5 6
Critical thinking	1 2 3 4 5 6	1 2 3 4 5 6
Evaluation	1 2 3 4 5 6	1 2 3 4 5 6
Hermeneutics	1 2 3 4 5 6	1 2 3 4 5 6
Reframing	1 2 3 4 5 6	1 2 3 4 5 6
Application	1 2 3 4 5 6	1 2 3 4 5 6
Inquiry	1 2 3 4 5 6	1 2 3 4 5 6

How compelling is this role to you, after having gone through this process?    1    2    3    4    5    6

Where would you put this role in your personal plan?                    Level 1                    Level 2                    Level 3

Preliminary Documentation – What documentation do you already have for this role?

Source	Format

Role Page: Leader

Focus: Primarily formal coursework and experience outside of PSP

Competencies Assessed for this Role:

[need to list]

Prior Experience with this role:

Context – when did you fulfil this role? <input type="checkbox"/> N/A	Cursory	Intermediate	In-Depth
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Future Relevance

Context – In what contexts can you see yourself fulfilling this role in the (near or distant future) <input type="checkbox"/> N/A	Near/ Distant	Cursory	Intermediate	In-Depth
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Key Points of Understanding:

	Current Degree of Understanding or Familiarity (1 low)	Degree of Interest or Future Relevance
Dynamics of complex systems	1 2 3 4 5 6	1 2 3 4 5 6
Institutional history and culture	1 2 3 4 5 6	1 2 3 4 5 6

Key Skills

	Current Skill Level (1 low)	Degree of Interest or Future Relevance
Facilitation	1 2 3 4 5 6	1 2 3 4 5 6
Strategic, tactical and contingency planning	1 2 3 4 5 6	1 2 3 4 5 6
Systems thinking	1 2 3 4 5 6	1 2 3 4 5 6
Team building	1 2 3 4 5 6	1 2 3 4 5 6
Problem solving	1 2 3 4 5 6	1 2 3 4 5 6
Clarify and Articulate institutional vision	1 2 3 4 5 6	1 2 3 4 5 6
Manage conflict	1 2 3 4 5 6	1 2 3 4 5 6
Make decisions	1 2 3 4 5 6	1 2 3 4 5 6
Design systems for challenge and support	1 2 3 4 5 6	1 2 3 4 5 6



How compelling is this role to you, after having gone through this process?    1    2    3    4    5    6

Where would you put this role in your personal plan?                    Level 1                    Level 2                    Level 3

Preliminary Documentation – What documentation do you already have for this role?

Source	Format

Role Page: Interventionist

Focus: Primarily formal course work and experience outside of PSP

Competencies Assessed for this Role:  
[need to list]

Prior Experience with this role:

Context – when did you fulfil this role? <input type="checkbox"/> N/A	Cursory	Intermediate	In-Depth
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Future Relevance

Context – In what contexts can you see yourself fulfilling this role in the (near or distant future) <input type="checkbox"/> N/A	Near/Distant	Cursory	Intermediate	In-Depth
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Key Points of Understanding:

	Current Degree of Understanding or Familiarity (1 low)	Degree of Interest or Future Relevance
Change theory, organizational and clinical	1 2 3 4 5 6	1 2 3 4 5 6
Group and individual behaviour	1 2 3 4 5 6	1 2 3 4 5 6
Models of intervention (particularly process of unfreezing, change/learning, refreezing)	1 2 3 4 5 6	1 2 3 4 5 6
Nature of defensive routines	1 2 3 4 5 6	1 2 3 4 5 6

Key Skills

	Current Skill Level (1 low)	Degree of Interest or Future Relevance
Contracting, re-contracting	1 2 3 4 5 6	1 2 3 4 5 6
Data collection	1 2 3 4 5 6	1 2 3 4 5 6
Analysis	1 2 3 4 5 6	1 2 3 4 5 6
Presentation	1 2 3 4 5 6	1 2 3 4 5 6
Planning for change	1 2 3 4 5 6	1 2 3 4 5 6

Closing a consultation with adequate reflection	1	2	3	4	5	6	1	2	3	4	5	6
---	---	---	---	---	---	---	---	---	---	---	---	---

How compelling is this role to you, after having gone through this process? 1 2 3 4 5 6

Where would you put this role in your personal plan? Level 1 Level 2 Level 3

Preliminary Documentation – What documentation do you already have for this role?

Source	Format

Role Page: Advocate

Focus: Primarily formal course work and experience outside of PSP

Competencies Assessed for this Role:  
[need to list]

Prior Experience with this role:

Context – when did you fulfil this role? <input type="checkbox"/> N/A	Cursory	Intermediate	In-Depth
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Future Relevance

Context – In what contexts can you see yourself fulfilling this role in the (near or distant future) <input type="checkbox"/> N/A	Near/ Distant	Cursory	Intermediate	In-Depth
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
		<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>

Key Points of Understanding:

	Current Degree of Understanding or Familiarity (1 low)	Degree of Interest or Future Relevance
community development, , , and the. Complimentary skills include.	1 2 3 4 5 6	1 2 3 4 5 6
political systems,	1 2 3 4 5 6	1 2 3 4 5 6
sources and nature of power	1 2 3 4 5 6	1 2 3 4 5 6
diffusion of innovation	1 2 3 4 5 6	1 2 3 4 5 6
alternative frames of reference	1 2 3 4 5 6	1 2 3 4 5 6
theories and strategies of large-scale change	1 2 3 4 5 6	1 2 3 4 5 6

Key Skills

	Current Skill Level (1 low)	Degree of Interest or Future Relevance
clarifying values	1 2 3 4 5 6	1 2 3 4 5 6
negotiating	1 2 3 4 5 6	1 2 3 4 5 6
reflecting	1 2 3 4 5 6	1 2 3 4 5 6
communication	1 2 3 4 5 6	1 2 3 4 5 6
leveraging	1 2 3 4 5 6	1 2 3 4 5 6
persuading	1 2 3 4 5 6	1 2 3 4 5 6
networking	1 2 3 4 5 6	1 2 3 4 5 6
building alliances	1 2 3 4 5 6	1 2 3 4 5 6

How compelling is this role to you, after having gone through this process? 1 2 3 4 5 6

Where would you put this role in your personal plan? Level 1 Level 2 Level 3

Preliminary Documentation – What documentation do you already have for this role?

Source	Format

## Portfolio Structure

[Technical Information – need to add information about formatting, locations for storage of digital media, transcription if needed, online portfolio storage sites, depending on what formats for documentation you are going to be accepting

Using Word to structure a document

Using Other software to structure documents -searchable, table of contents

Appendix – data storage and transcription services]

## Portfolio Entries

Checklist: PSP Doctoral Checklist [organizer for student, also a summary for the reviewer – especially if all documentation is not in one place – ie video or audio]

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 best work samples as they are completed. 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 Advisor 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 busy 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 and Clinical 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 each Level One Role (total of at least four documents), two for each Level Two Role (total of at least four documents), and three for each Level Three Role (total of at least six documents)

Summary Page for Documentary Source

Template: Summary Page

Doctoral Portfolio Documentary Source Checklist Detail Report

(Appendix – for reviewer) – This is a summary to keep you on track and to give your reviewer information on what they are looking for, and where.

Competency Cluster Level	Role	Documentation Title	Documentation Type	Documentation Location (choose a category and then give the location)
1.1	Choose an item.	<input type="checkbox"/> 1.	Choose an item.	Choose an item.
		<input type="checkbox"/> 2.	Choose an item.	Choose an item.
		<input type="checkbox"/>	Choose an item.	Choose an item.
1.2	Choose an item.	<input type="checkbox"/> 1.	Choose an item.	Choose an item.
		<input type="checkbox"/> 2.	Choose an item.	Choose an item.
		<input type="checkbox"/>	Choose an item.	Choose an item.
2.1	Choose an item.	<input type="checkbox"/> 1.	Choose an item.	Choose an item.
		<input type="checkbox"/> 2.	Choose an item.	Choose an item.
		<input type="checkbox"/> 3.	Choose an item.	Choose an item.
		<input type="checkbox"/>	Choose an item.	Choose an item.
2.2	Choose an item.	<input type="checkbox"/> 1.	Choose an item.	Choose an item.
		<input type="checkbox"/> 2.	Choose an item.	Choose an item.
		<input type="checkbox"/> 3.	Choose an item.	Choose an item.

		<input type="checkbox"/>	Choose an item.	Choose an item.
3.1	Choose an item.	<input type="checkbox"/> 1.	Choose an item.	Choose an item.
		<input type="checkbox"/> 2.	Choose an item.	Choose an item.
		<input type="checkbox"/> 3.	Choose an item.	Choose an item.
		<input type="checkbox"/> 4.	Choose an item.	Choose an item.
		<input type="checkbox"/>	Choose an item.	Choose an item.
		<input type="checkbox"/>	Choose an item.	Choose an item.
3.2	Choose an item.	<input type="checkbox"/> 1.	Choose an item.	Choose an item.
		<input type="checkbox"/> 2.	Choose an item.	Choose an item.
		<input type="checkbox"/> 3.	Choose an item.	Choose an item.
		<input type="checkbox"/> 4.	Choose an item.	Choose an item.
		<input type="checkbox"/>	Choose an item.	Choose an item.
		<input type="checkbox"/>	Choose an item.	Choose an item.
	Choose an item.		Choose an item.	Choose an item.

[need rubric and competencies]

Role	Level 0 (required regardless of Focus Roles selected)	One Source to document Level 1, 2, or 3 attainment	Total Portfolio Minimum Sources
<b>Teacher</b>	One Source Related to Coursework	<u>Example:</u> <ul style="list-style-type: none"> <li>• Lesson plan, teaching materials</li> <li>• Paper documenting the teaching process including student evaluations</li> </ul>	<b>2</b>
<b>Researcher</b>	One Source Related to Coursework	<u>Example:</u> <ul style="list-style-type: none"> <li>• Examination copy</li> <li>• Research article copy</li> <li>• Additional coursework Sample</li> </ul>	<b>2</b>



<b>Scholar</b>	One Source Related to Coursework	<u>Example:</u> <ul style="list-style-type: none"> <li>• Additional coursework Sample</li> <li>• Examination copy</li> <li>• Article copy</li> </ul>	<b>2</b>
<b>Interventionist</b>	One Source Related to Coursework	<u>Example:</u> <ul style="list-style-type: none"> <li>• Field work documentation (products) and outcome evaluations</li> <li>• Paper discussing field work</li> </ul>	<b>2</b>
<b>Leader</b>	One Source Related to Coursework	<u>Example:</u> <ul style="list-style-type: none"> <li>• Field work documentation (products) and outcome evaluations</li> <li>• Paper discussing field work</li> </ul>	<b>2</b>
<b>Advocate</b>	One Source Related to Coursework	<u>Example:</u> <ul style="list-style-type: none"> <li>• Field work documentation (products) and outcome evaluations</li> <li>• Paper discussing field work</li> </ul>	<b>2</b>
<b>Total Minimum Documentary Sources</b>			<b>14</b> <b>Consisting of:</b> <b>4 Level 1 Sources</b> <b>4 Level 2 Sources</b> <b>6 Level 3 Sources</b>

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

Process for Portfolio Review

Completed Portfolio

Appendix A: Role Documentation

Appendix B: Instructions to Portfolio Advisor

## Template: Introductory Content and Reflection Documents

### Learning Objectives

How many?

Format?

Voice?

Change over time – Pre-Portfolio and during process – keep log rather than one completed document to track changes

### Role Selection Rationale

Reflection on Process

Rationale for why you selected the roles you did

Include the role pages

### Reflective Document

Needs parameters

## Template: Documentary Source Summary Page

Title:

In Support of:

Role:

Level:

Summary of Source:

Summary of Included Documents:

Document/Media	Format	Location