



THE PROFESSIONAL SCHOOL OF  
PSYCHOLOGY

PORTFOLIO MANUAL FOR DOCTORAL  
STUDENTS  
VERSION 11.0

*PSP Doctoral Portfolio Manual*

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## 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

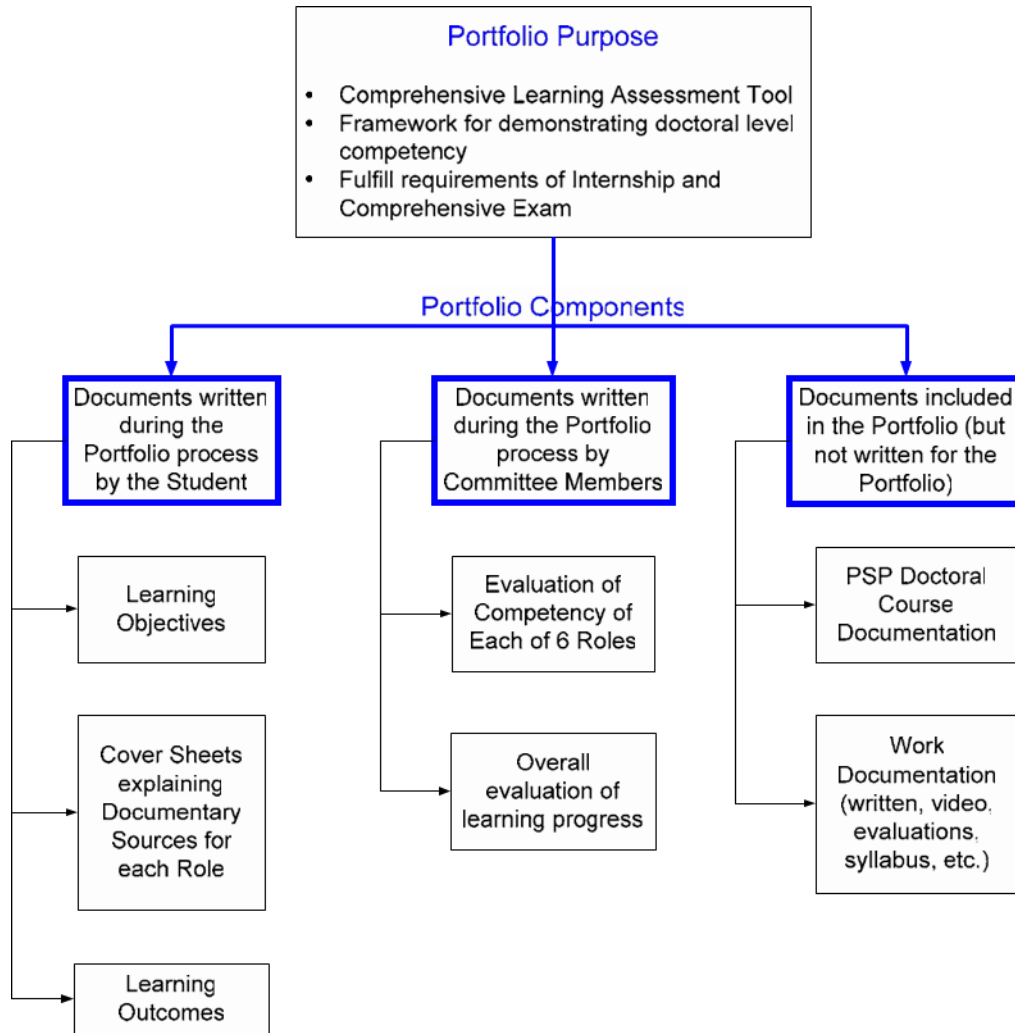
This manual is designed and written for face-to-face training sessions between students who are just beginning their Portfolios and students or faculty who have experience with the Portfolio process. Reading about the Portfolio and understanding what it will look like is much easier when samples of Portfolios 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.

### Purpose of a Portfolio

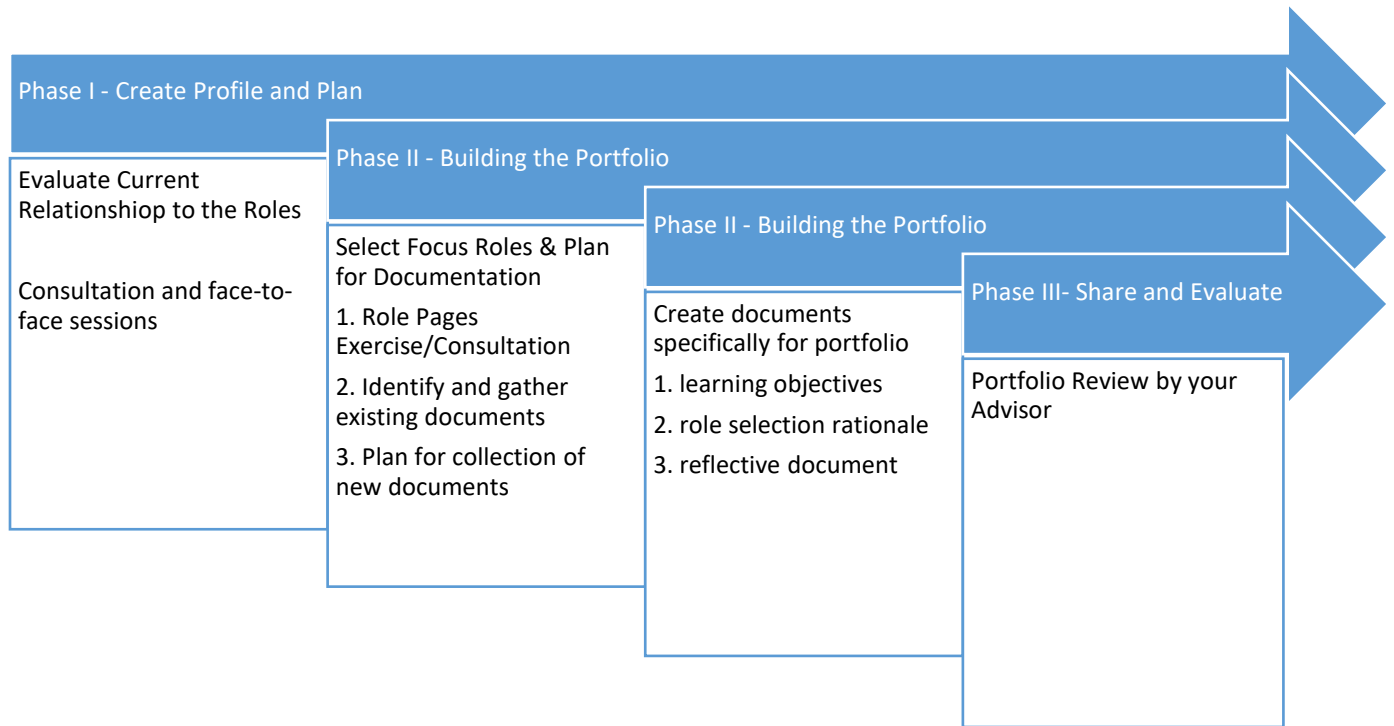
The Portfolio is an option in lieu of completion of a formal supervised internship (PSY 801) and related case conferences (PSY 840 and 890). A Portfolio process consists of three components. First, a series of competency categories is established to determine what will be evaluated. Second, a set of 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.

## Role of the Portfolio Advisor

The Portfolio Advisor is selected by each student in consultation with Chief Student Engagement Officer’s program. See “Appendix A” for detailed Advisor instructions. 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.

#### 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).
6. 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.

One outcome of your successful completion of the Portfolio process is 10 units of academic credit awarded as a replacement for the doctoral internship requirement (PSY 801). A second outcome is the awarding of 4 units of academic credit as a replacement for the clinical case conference course (PSY 890) or 3 units of academic credit as a replacement for the organizational case conference course (PSY 840).

As a base for the assignment of these academic credits, it is required that a minimum of **1,500 hours** be allocated toward completion of life experiences/course work that have produced documented accomplishments and at least **120 hours** be allocated toward review, reflection and preparation of summary reports regarding the six roles.

It is assumed that the two **level one** roles will encompass at least **150 hours** of life experiences/course work that have produced documented accomplishments. It is required that the student devote at least **20 hours** to preparation of appropriate documentation for these level one roles.

It is assumed that the two **level two** roles will encompass at least **250 hours** of life experiences/course work that have produced documented accomplishments. It is required that the student devote at least **40 hours** to preparation of appropriate documentation for these level one roles.

It is assumed that the two **level three** roles will encompass at least **350 hours** of life experiences/course work that have produced documented accomplishments. It is required that the student devote at least **60 hours** to preparation of appropriate documentation for these level one roles.

To repeat, the portfolio will encompass at least **1,500 hours** of life experience/course work, and the products/accomplishments of these 1,500 hours will be documented through at least **120 hours** of review, reflection and preparation of summary reports regarding the six roles.

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 fulfill 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 fulfill 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 fulfill 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 fulfill 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 fulfill 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 behavior  | 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 fulfill 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                         | 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 Entries

### Checklist: PSP Doctoral Checklist

Your personal Portfolio should be structured so that each role is documented for the level of emphasis determined by the student for competency. 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.

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)

### Doctoral Portfolio Documentary Source Checklist Detail Report

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. |



| 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><br><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><br><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><br><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><br><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><br><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><br><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><br><b>Consisting of:</b><br><b>4 Level 1 Sources</b><br><b>4 Level 2 Sources</b><br><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. A well-rounded Portfolio should contain a sampling of each documentary source.

## Template: Documentary Source Summary Page

Title:

In Support of:

Role:

Level:

Summary of Source:

Summary of Included Documents:

| Document/Media | Format | Location |
|----------------|--------|----------|
|                |        |          |
|                |        |          |
|                |        |          |

## APPENDIX A: INSTRUCTIONS TO PORTFOLIO ADVISOR

The role of the Portfolio Advisor 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.

The Advisor 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 the Portfolio Advisor.

The Advisor will provide feedback within 2 weeks of receipt of portfolio draft and within 4 weeks of receipt of final portfolio.

To provide further guidance for you as Portfolio Advisor we offer the following description (taken from the PSP SLOAP Manual) as a way of assessing the quality (critical thinking) of each Portfolio document (with regard to each of the three levels).

### **Portfolio Assessment with Emphasis on Three Levels of Critical Thinking**

Each student prepares a portfolio prior to being advanced to candidacy. The portfolio consists of documents regarding six roles of the professional psychologist: (1) researcher, (2) scholar, (3) interventionist, (4) teacher, (5) advocate and (6) leader. In two areas, the student is to demonstrate understanding, in two areas both understanding and competence, and in two areas, understanding, competence and mastery.

### **Level One: Understanding**

The Context: in working toward Understanding in a specific role, the student will be preparing to effectively represent himself/herself as broadly knowledgeable in a specific human service discipline and with regard to a specific role. Understanding is about acquiring the background and appreciating the central questions associated with a specific discipline, a specific domain of human service and a specific role within this domain.

The Value Statement: in working toward Understanding in a specific role, the student is expected to be directed toward the goal of Being Articulate in the World. They have gained knowledge in many areas related to their field of interest and can enter into informed discussions concerning the challenges and opportunities within this field.

Nature of the Product/Service: Understanding is evident in work prepared by the student that demonstrates the ability to apply concepts from multiple perspectives within their discipline, human service field and specific role. The student is seeking to become a credible representative in a specific discipline -- beyond just the field of human service for which they are preparing or in which they already work (but wish to be more effective and credible).

Typical Evidence; (1) work prepared for a specific course, (2) project reports, program plans or position papers being prepared for a specific institution, (3) articles written for publication in a digital library that applies some concept(s) from their discipline to a specific problem or challenge in a specific human service field, (4) case study providing multiple perspectives (informed by several subspecialties in their discipline) that inform the building of an action plan to address the issues embedded in this case.

### **Level Two: Competence**

The Context: in working toward Competence in a specific role, the student will often be seeking to prepare for licensing in a specific professional field or building evidence of professional-level

skills and knowledge in the performance of this role. Competence is about “meeting the requirements” and becoming a successful professional contributor to a specific domain of human service.

The Value Statement: in working toward Competence in a specific role, the student is expected to be directed toward the goal of Being Good IN the World (obtaining skills and knowledge that specifically is aligned with the student’s personal needs, interests and career/life goals).

Perseverance and openness to new learning and challenging perspectives, as well as the acquisition of advanced human service skills are evident in the work being done by this student in their performance of this role. The student is seeking to be a successful contributor to a field of human service that is of benefit to many people over an extended period of time.

Nature of the Product/Service: Competence is evident in the crafting of a product or provision of a service that meets the standards of high quality in the role being assessed. The work being done is preparing the student to effectively engage the world. The student is expected to provide evidence that they have the ability to do what it is that they need to do in order to be successful in their professional work.

Typical Evidence: (1) take a case from beginning to end—walking through and demonstrating competence at each step, (2) completion of series of courses related to a specific professional endeavor culminating in some practical demonstration of integrated competence, (3) performance (role play) in a simulated setting, (4) active and sustained work in a human service institution with concrete evidence of successful practice.

### **Level Three: Mastery**

The Context: in working toward Mastery in a specific role, the student would usually have also been awarded a license or some other document regarding competency in the performance of this role. Mastery is about “going beyond the requirements” and becoming a unique and highly beneficial contributor to a specific domain of human service.

The Value Statement: in working toward Mastery in this role, the student is expected to be directed toward the goal of Being Good FOR the World (above and beyond personal needs and interests). Intense interest, sustained commitment and dedication – even passion—are evident in the work being done by this student in their performance of this role. The student is seeking to leave a “mark” – a legacy – that is of benefit to many people over an extended period of time.

Nature of the Product/Service: Mastery is evident in a product or service that makes a real difference and is truly ground-breaking: innovative, new, distinctive, generative. Performance that provides evidence of not only mastery of theory and practice, but also creative intuition. Something with a “WOW” factor—a product or service that builds on skills and crafts currently being engaged by other people, but moves beyond the current state to something unique.

Typical Evidence; (1) completion of major project that is being acknowledged, used and even honored by outside constituency, (2) published essay on established website (3) published book, (4) series of articles in a refereed journal, (5) guidebook for use in specific human service field, (6) major institutional transformation or creation of an institution.