PORTFOLIOS : Guidelines with Sample

agreed at 2026 AGM

A portfolio is a collection of materials (preferably digital) that are compiled over a specified period of time for one's own reflection and presented to another when required, usually as evidence of one's recent learning and points of growth.

What is it for?

A portfolio is a key component in quality assurance. It provides a focus for reflection on experience, feedback, new insights, and areas for further development for the member. It indicates a commitment by our members to good standards and to lifelong learning.

The portfolio envisaged is –

- self-directed and readily understood as congruent with SD practice
- personal, and flexible for varied contexts, stages, modes and learning styles
- encourages ongoing reflection, and growth: it is formative
- includes a range of evidence, mostly digital, but hard copies can be presented
- supported by supervision - recommended annual reflection with Supervisor
- sparing of time, effort and cost; regular record-keeping and no extra meetings.

The portfolio is kept and used by the director. They refer to the portfolio often during a year to check they are meeting their commitments to planned learning, training, workshops, reading. The director also adds new material relevant to that year and one's plans for the future.

It is the focus of a normal supervision session every year or so, for everyone, both Associates, and Full members, whether in very part-time or significant practice. The frequency and timing is agreed in advance with one's supervisor.

What might it contain? (see also SAMPLE below)

1. **A summary list, providing evidence of engagement with each of the five categories below** (at least one entry in each category is a basic goal, recognising that some members are very part time in SD.)
    - *Professional development /Learning plan (review the last period and plans for next)* essential.
    - *Spiritual development*
    - *Ongoing education & learning from others*
    - *Review of practice (* log of supervision; in-depth reflections, key learnings)
    - *Cultural and diversity understandings and Te Ao Maori*

2. **A variety of supporting documents, e.g. an attendance certificate, a card/email from a directee.**

SAMPLE Portfolio / template

Please copy this document for your own use

A portfolio for: ***[name]*** Years: 2025-2026

These categories below guide and alert members to any evidence of learning and development – and their reflections. Aim for at least one entry in each category; negotiate this in advance with your supervisor.

Categories of 'evidence' & reflection	**List of items in each category + dates** These are merely examples – members will have their own items to present
PD/learning plan Part 1: reviewing past plan	- *Self-review of my supervised practice recently (attached).* - *Assessment of my engagement with previous PD plan*
Part 2: a plan for growth going forward *OR :* a more detailed PD Plan if needed.	***This leads to the following (Part 2): e.g. (make it your own)*** - *I will attend local community classes to learn level 1 Te Reo* - *I will engage with an in-person silent guided retreat of 5-7 days in the next 6 months (funds set aside for this)* - *I want to read and learn more about being creative in SD sessions e.g. images for directees to respond to, creativity when online: any suggestions for where, how to do this?* - *I'm pursuing opportunities for offering group spiritual direction – and also group supervision … and pondering the skills for these.*
Spiritual development (retreats, quiet days, personal journal extracts, writings, poems, homilies…)	• *Silent retreat 7 days at Sr Evelyn, Chch. March 2025* • *Guided retreat 3 days, St Francis Friary, Oct 2025* • *Self-directed, 4 days, St Isaac's, Te Tai Tokerau.* • *Journal extract x 3 (attached) reviewing a recent insight* • *Poems, haiku, I've written (attached)* • *Curating a Pentecost prayer station for local church (May 2026): Praying with Art* • *Wrote Kia Tau prayers for Lent (a series of 7) ;Feb 2025* Reflection on these ….
Ongoing education & learning from others (conferences, seminars, books, podcasts, collegial network discussions, workshops, training event, a community of practice)	*Local Network attendance:* *2025 – sessions on: enneagram; digital awareness; Collage; pilgrimage.* *2026 – March - day seminar, May – Working with the Shadow online;* *August Auckland Network - hosting and facilitating* *Safeguarding Training workshop at Diocese event: June 2025* *Training Event: October 2026* *Books read: Unforming, Cindy Lee*

	Huia Come Home , J Ruka *It Works, Halstead & Halstead*
Cultural understanding and Te Ao Maori (reflection on events, language learning, engagement with other worldviews, perspectives, intersectionality)	*Chinese New Year celebration, Feb 2026* *Regular attendance at Tikanga Maori church in Tamaki Makaurau* *Learning Te Reo with Maori Made Easy, S Morrison* *Befriending trans woman neighbour and her wife*
Review of practice (log & reflections on supervision, observed practice, verbatim, audio or video clips)	*Video clip from a Zoom session with a pilgrim … with self-critique and supervisor comment.* *Five self-reviews in preparation for my supervision in the last year*
In depth reflections on key learnings; Min 500 words	

Supporting Documents

(It is helpful to keep them all in one place, so deciding where that is and then attach. Keep them in a google folder, a folder on your desk or in your filing cabinet…)

e.g.

- *Record of spiritual direction sessions given*
- *Record of supervision sessions and my review in preparation for them*
- *Receipts / attendance records for workshops, retreats, etc.*
- *Self-reflections on what I have learned this year and hopes for future learning*
- *Personal writings : poem, liturgies, journal extracts, etc*
- *Notes of appreciation: e.g. 3 cards , 2 emails.*
- *Safeguarding training with reflections*