Personal Development Portfolio

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Professional Group

....

Registration No..........

CONTENTS PAGE

* these are available separately on the website in word format

Introduction to the portfolio

What is a portfolio?

A portfolio is a personalised collection of materials. There are two main types of portfolios: 1) personal and 2) professional.

In a personal portfolio, the focus is generally on a specific life event, e.g., one's birth, graduation etc. This type of portfolio highlights memories that are more personal in nature.

A professional portfolio is a reflection of you as a professional person. It is a record of your professional development and how you document the job. It records what you have accomplished and describes your efforts to develop new skills.

Why create a professional portfolio?

It provides a structured process to review and record learning related to professional practice
It demonstrates the quality and quantity of your professional development
It is helpful in marketing your capabilities in job interviews
It is valuable as a tool to negotiate promotions and re-grading
It can be used when applying for scholarships or grants

Table of Contents

The table of contents can be organised in one of two ways:
1) Chronologically – sections are packaged according to job description and dates the portfolio samples represent. This scheme helps an individual who has been in a particular field over time to demonstrate increasing improvement and accomplishment.
2) Functionally – sections are packaged according to the components of the job. This scheme works when an individual has varied aspects that need to be pulled together to demonstrate ability in specified areas.
3) Chaplaincy – would combine elements of both these since part 1 will record the chronology of education, faith community experience and training to current day and therefore serve as a historical record. Part 2 will record details of your current position and part 3 will have sub sections to cover aspects of chaplaincy like, education and training, pastoral practice, publications, etc.

What might be included in a portfolio?

Examples of what might be contained in each section include:

- Your career goals.
- A copy of your CV.
- A list of your skill sets or competencies.
- Letters of reference or recommendation from previous employers, from volunteer work, from work-study programs such as jobs, student placements, summer jobs, peer tutoring and so on.
- Transcripts.
- A summary of community service or volunteer work you have done.
- Academic awards.
- Copies of educational certificates, diplomas or degrees.
- Copies of positive performance appraisals.
- E-mails, thank you letters, and handwritten notes complimenting you on a job well done.
- Company announcements of promotions, awards or achievements.
- Documents you may have designed-brochures, flyers, pamphlets, report covers, reports.
- Flyers, conference brochures, or other materials describing presentations, workshops or seminars you have presented.
- Photographs representing projects you have been involved in. (For example, a photograph of a conference display booth you created for a previous employer.)
- Copies of evaluations from a workshop you presented or a speech you made
- Evidence of professional affiliations and member ship of professional bodies
- Licenses or certificates
- Evidence of specific skills
- Work examples
- Involvement with committees, work groups or projects

As you gain more experience, you will want to include:

- A list of articles you have published.
- Samples of articles you have published.
- A report on research you have conducted.
- Articles written about you or projects you have been involved in (newspapers, company newsletters, etc.)
- A list of professional memberships or associations you belong to that are work-related, including any special committees on which you serve.

Depending on your professional field, specific items can be added to the list above to provide an accurate representation of your knowledge and abilities.
As you can imagine, your professional portfolio can be quite a collection of things.

Other Guidelines

Do not include items of a personal nature that are related to your personal life. All items in the portfolio should be clear demonstrations of your work related skills and achievements.

Make sure you have attributed correctly all materials. It should be very clear what is your own personal creation and what was shared or derived from other people.

Remember that your portfolio is a work in progress. It is necessary to up date it from time to time and ensure it reflects what you have been doing in your professional life.

The purposes of portfolios

Portfolios can have a variety of uses and benefits.

- They boost self esteem providing documentary evidence of development and achievement.
- They allow a practitioner to show individuality and creativity in their role.
- It is a hard copy proof of talents you possess and provides insight into potential areas of interest, thus making preparation for interview easier.
- They are a place for the practitioner to organise their thoughts and ideas about chaplaincy identifying personal learning needs in practice as a proactive way of managing individual performance reviews.
- They should also demonstrate some measure of self reflection. An ability to distinguish what was good, what could have been done better and why something worked as expected or failed to do so. It enhances professional practice through reflection on practice.
- They show over a period of time professional growth in diverse situations and relay personal attitudes to chaplaincy.
- By selectively gathering documents of achievements it allows the practitioners to gain a deeper picture of where they have been, where they are now and where they are going in the profession.
- They have the potential to generate practice based evidence alongside more traditional forms of evidence based practice.
- They will serve as an invaluable part of any appraisal process as you demonstrate your current professional practice and development.

It will serve to complement the KSF outline for your post and provide a record for comparison by yourself and another if necessary.

Introduction to lifelong learning

Lifelong learning

The term, lifelong learning has come into vogue as the concept of education changes and undergoes a process of reinterpretation. In the last few decades we have seen a move away from education understood as something done to you and instead recognise that education is the responsibility of anyone who wishes to grow personally and professionally. Since the 1980's learning is something that people take responsibility for and you choose what to study to develop your self.

Lifelong learning is a wide spread concept and encompasses a diversity of methods but its over riding aim is important to understand.

Lifelong learning is a process of learning throughout a lifetime and from the many and diverse experiences of life - its challenges, difficulties, failures and opportunities. Learning is about addressing new experiences and other perspectives, allowing them to change us and understanding their manifold facets so that we are different people.
Such an approach calls for a willingness to change and grow. A willingness to accept that former understandings may need to alter and you may be challenged by your perception of yourself as others present it.

Such an approach is crucial for chaplaincy since it recognises that the main instrument we use in all of our work is ourselves and therefore the primary focus of education needs to centre on that understanding. The dominant nuance of the chaplain therefore could be encapsulated with the phrase, "knowing in action through reflection upon practice" which is a major goal of lifelong learning.

Education was traditionally understood as something that was taken in or absorbed in a rather static way. The new emphasis is to see education as a process and something that is dynamic. The chaplain will readily engage with this since we continually encounter people and situations which cause us to reappraise our understanding of life and we are transformed by them. Theological education is therefore not something that only happens in college but it is concerned with the ongoing formation of the practitioner as someone who interprets the traditions and scripture in changing situations.

Lifelong learning is more than simply keeping up to date. It requires an approach to the practice of chaplaincy that is constantly challenging and engaging in critical reflection. The concept of the chaplain who has qualified or state registered is not recognised as yet. There is awareness that formal qualification is part of the education process in the UK but not the whole picture in terms of professional development. For a chaplain to decide that they have arrived and can put their feet up is a sad position to reach since exposure to new and varied situations continues unabated in the work. The possibility to continue to grow and develop through those encounters is significant.

The concept of the practitioner as a continual or life long learner has increasingly gained credence over the past years. The English Nursing Board (ENB) in 1994 described the characteristics of lifelong learners as being:

- Innovative in practice
- Flexible to changing demands
- Resourceful in their methods of working
- Able to work as change agents
- Able to share good practice and knowledge
- Adaptable to changing health care needs
- Challenging and creative in their practice
- Self reliant in their way of working
- Responsible and accountable for their work

There is often a tendency to think of the learning needs of others be that part timers, volunteers, students, rather than those already qualified and practicing. But all practitioners are potential learners in practice. One of the key skills is to see yourself as a practitioner who can communicate with your self through critical reflection and being able to see that same practice through different lenses or perspectives.

By the process of lifelong learning there is a desire to:

- Keep up to date with new developments in practice
- Think and reflect for your self
- Demonstrate that you are keeping up to date and developing your practice
- Provide the best possible care for your clients.

The consequence of this approach is to turn routine and everyday practice into potential learning events and thereby make practice more challenging and exciting.

The present format of the CPD portfolio is to facilitate that process and certain elements, which are by no means definitive, have been included to allow practitioners to develop and grow professionally. `

Guidance in completing your portfolio

There follows some detailed guidance about how you might complete your portfolio and some of the rationale behind the process is briefly explained. It is recognised that some of this material is duplicated under the individual sections to save a great deal of movement through the actual portfolio to find the relevant details. They are combined here to enable an overview to be given.

Part 1   Previous history

In this section give details of a number of aspects of your working life as you might find them on your CV.

There are a number of categories that have been devised for your guidance. It is not necessary to complete each category if that is not appropriate for you, but the various sections give you prompts of what might be included.

A)   Record of formal education from secondary school onwards.

B)   Record of Non Health care appointments so your whole employment record can be understood as a full context.

C)   Record of Church/Faith experience which needs to record the details of the faith group accreditation to which you belong. In addition you need to record all the church/faith group experience you have had to demonstrate your good standing within that faith/church tradition.

D)   Record of Chaplaincy experience which is to include all posts and experience in chaplaincy whether that is honorary, locum, part-time, etc. This section would not include any education or training that is relevant to chaplaincy but simply the experience you have had doing the job.

The various charts below provide a skeleton in which you can place those details. The format of the electronic copy allows for you to place as much, material as you wish in each section and the final copy to be well presented.

Part 2   Current Position

In this section a number of papers you should already have in your possession need to be gathered together into one place. These include key aspects of your current position. There are four parts:

A)   The summary of your current post which you would have been given on appointment.

B)   The job description would have initially been given to you on application for the post. It might have subsequently been re written and updated so you need to include the latest version. Many of these have been revised under the Agenda for Change process during 2005/6.

C)   The Knowledge and Skills framework (KSF) outline for the post you now occupy. A copy of a generic KSF outline for your post can be found on the CAAB website, www.caabweb.org.

D)   A copy of the job plan. A copy of the basic template for this is included in the appendix to these notes.

Part 3   Continuing Professional Development

In this section record learning activity related to chaplaincy, this may include formal courses and it could therefore cross-refer to the Education section.

Continuing Professional Development (CPD) is an educative and developmental process for chaplains to maintain and enhance their knowledge and skills in the context of professional practice. The aims of CPD are to ensure that chaplains are able to meet the standards required for competent practice and to promote excellence in the profession.

The CPD is conceptually broken into 3 broad spheres, educational, experiential and evidential, as reflective of the chaplains' work and world. To capture the data consistently this will be recorded by the 5 category model of the table below.

A)   *Educational activity* which will record any chaplaincy related learning activity and might include courses attended with the attendant evaluation papers, (a template for such evaluation papers is to be found in the appendix), and any certificates that are issued at the various events attended.

B)   *Experiential activity* which will gather together reflective papers that have been written for group reflections. There will also be supervision reports which the chaplain will have produced to use in a supervision session. Other formation material and or critiques will be included in this section to demonstrate that learning has consisted of an experiential component and that the practitioner can demonstrate ability to document and reflect upon current practice.

C)   *Evidential activity* is a broad term which is being used to gather together a variety of materials that are indicative of the chaplain's practice. The list includes lists of talks or lectures given to varying groups. Lists of articles that have been written as well as a list of book reviews produced. A sample of sermons or homilies could be included. Also audits undertaken, service reviews participated in and any research activity recorded.

Any event or activity that meets educational needs for chaplains and provides an effective learning event may be considered as a form of CPD. .There is many ways that chaplains can learn and to capture the data consistently this will be recorded by the 5 category model below:

1. ***Individual activities***: ***Self-directed learning*** undertaken and evaluated by the Chaplain. Examples include reading journals and articles, reviewing books and papers, updating knowledge via information sources.

2. ***Individual activities: Professional activity*** undertaken and evaluated by the Chaplain or Senior Chaplain. Examples include supervising, teaching, presentation at conferences, publications, involvement in a professional body, Local Research Ethics Committee (LREC).

3. ***Internal activities: Work based learning*** undertaken and evaluated by the Chaplain or Senior Chaplain. Examples include reflective practice, clinical supervision, case study, audit, user feedback, journal club.

4. ***External activities: Formal educational activity*** accredited by CAAB in which the chaplain participates in an event that is delivered by peers or an educational provider, usually with a regional, national or international context. Examples include workshops, conferences, and courses, planning or running a course and obtaining recognised qualifications.

5. ***External other activities*** undertaken and evaluated by the Chaplain or Senior Chaplain. Examples include public service, faith community activity, and voluntary work.

Each activity would need to meet approval criteria in order to demonstrate that it contributes to CPD and chaplains would be required to document and keep evidence of the learning achieved.

In order to promote a range of learning it is the expectation that CPD points should be gained across all three categories; individual, internal and external.

Category	Examples	Accredited by
Individual: Self-directed learning	reading journals and articles, reviewing books and papers, updating knowledge via information sources	Individual Chaplain
Individual: Professional activity	supervising, teaching, presentation at conferences, publications, involvement in a professional body, LREC	Individual, Senior or Principal Chaplain*
Internal: Work-based learning	reflective practice, clinical supervision, case study, audit, user feedback, journal club	Senior or Principal Chaplain*
External: Formal educational activity	workshops, conferences, courses, planning or running a course	CAAB
External: other activities	public service, faith community activity, voluntary work	Individual, Senior or Principal Chaplain*

* note that where the activity is undertaken by a Senior or Principal chaplain this must be accredited by another Senior or Principal chaplain

Each chaplain is expected to achieve a minimum number of points per year. These are divided into the categories and the minimum and maximum points for each year in each category are listed in section 8 of these notes.

An updated version of these notes and the relevant forms (in Microsoft Word format) are available on the CAAB web site so they can be downloaded for ease of access. Further guidance on CPD and the portfolio will be posted on the CAAB web site and regular updated links provided by the professional associations.

Part 1: Previous History

Part 1 A

Record of Education

Record in the various sections the relevant details of your formal education from secondary school onwards.

Secondary Schools (11 to 16)

Dates (From… To…)	Name and address of institution	Subjects studied	Qualification achieved (and grade where relevant)

Post -16 education (before degree level)

Dates (From… To…)	Name and address of institution	Subjects studied	Qualification achieved (and grade where relevant)

University education

Dates (From… To…)	Name and address of institution	Subjects studied	Qualification achieved (and grade where relevant)

Other courses, programmes and training.

Dates (from… to…)	Institution or provider	Name of course	Qualification achieved and year	Topics covered	Skills acquired

Part 1 B

Record of Non Health care appointments

This record of Non Health care appointments provides your whole employment record so it can be understood as a full context.

Dates (from… to…)	Institution or provider or company	Role or function	Address	Reason for leaving

Other qualifications and experience
Driving licence, additional languages etc that may be relevant

1.

2.

3.

Part 1 C

Church/Faith Group experience

This Record of Church/Faith experience needs to provide the details of the faith group accreditation to which you belong. In addition you need to record all the church/faith group experience you have had to demonstrate your good standing within that faith/church tradition.

Dates	Church/Faith Group	Ordination / Accreditation	Place

Church/Faith Group experience

Dates	Church/Faith Group	Appointment	Place

Part 1 D

Chaplaincy Experience

This record of Chaplaincy experience which is to include all posts and experience in chaplaincy whether that is honorary, locum, part- time etc. This section would not include any education or training that is relevant to chaplaincy but simply the experience you have had doing the job.

Dates (From… to…)	Institution or provider	Role	Number of sessions	Specific areas covered

Part 2: Current Position

In this section a number of papers you should already have in your possession need to be gathered together into one place. These include key aspects of your current position. There are four parts:

A) The summary of your current post which you would have been given on appointment.

B) The job description which would have initially been given to you on application for the post. It might have subsequently been re written and updated so you need to include the latest version. Many of these have been revised under the Agenda for Change process during 2005/6.

C) The Knowledge and Skills framework (KSF) outline for the post you now occupy. A copy of a generic KSF outline for your post can be found on the CAAB website, www.caabweb.org.

D) A copy of the job plan. A copy of the basic template for this is included in the appendix to these notes.

Part 3 :   Continuing Professional Development

In this section record learning activity related to chaplaincy, this may include formal courses and it could therefore cross-refer to the Education section.

Continuing Professional Development (CPD) is an educative and developmental process for chaplains to maintain and enhance their knowledge and skills in the context of professional practice. The aims of CPD are to ensure that chaplains are able to meet the standards required for competent practice and to promote excellence in the profession.

Any event or activity that meets educational needs for chaplains and provides an effective learning event may be considered as a form of CPD. There are many ways that chaplains can learn and these can be broadly described within five categories:

1. *Individual activities*: *Self-directed learning* undertaken and evaluated by the chaplain. Examples include reading journals and articles, reviewing books and papers, updating knowledge via information sources.

2. *Individual activities: Professional activity* undertaken and evaluated by the Chaplain or Senior Chaplain. Examples include supervising, teaching, presentation at conferences, publications, involvement in a professional body, LREC.

3. *Internal activities: Work based learning* undertaken and evaluated by the Chaplain or Senior Chaplain. Examples include reflective practice, clinical supervision, case study, audit, user feedback, journal club.

4. *External activities: Formal educational activity* accredited by CAAB in which the chaplain participates in an event that is delivered by peers or an educational provider, usually with a regional, national or international context. Examples include workshops, conferences, courses, planning or running a course and obtaining recognised qualifications.

5. *External other activities* undertaken and evaluated by the Chaplain or Senior Chaplain. Examples include public service, faith community activity and voluntary work.

Each activity would need to meet approval criteria in order to demonstrate that it contributes to CPD and chaplains would be required to document and keep evidence of the learning achieved.

In order to promote a range of learning it is the expectation that CPD points or credits should be gained across all three categories individual, internal and external.

Part 3 .1

Individual activities

Individual activities: ***Self-directed learning*** undertaken and evaluated by the chaplain. Examples including reading journals and articles, reviewing books and papers, updating knowledge via information sources.

Year	Event	Dates	CPD points	Total	Supervisor's approval

Part 3 .2

Individual activities

Individual activities: Professional activity undertaken and evaluated by the Chaplain or Senior Chaplain. Examples include supervising, teaching, presentation at conferences, publications, involvement in a professional body, LREC.

Year	Event	Dates	CPD points	Total	Supervisor's approval

Part 3 .3

Internal activities

Internal activities: Work based learning undertaken and evaluated by the Chaplain or Senior Chaplain. Examples include reflective practice, clinical supervision, case study, audit, user feedback, journal club.

Year	Event	Dates	CPD points	Total	Supervisor's approval

Part 3 .4

External activities

External activities: Formal educational activity accredited by CAAB in which the chaplain participates in an event that is delivered by peers or an educational provider, usually with a regional, national or international context. Examples include workshops, conferences, courses, planning or running a course and obtaining recognised qualifications.

Year	Event	Dates	CPD points	Total	Supervisor's approval

Part 3 .5

External activities

External other activities undertaken and evaluated by the Chaplain or Senior Chaplain. Examples include public service, faith community activity and voluntary work.

Year	Event	Dates	CPD points	Total	Supervisors approval

Part 3
Annual summary sheet

The annual summary sheet is found in the appendix and it is expected that each year this sheet will be completed and returned to CAAB by 30th January 2008 to document the relevant CPD that has been undertaken during the year. An extra copy will be kept on file for record and appraisal purposes.

<u>ANNUAL SUMMARY OF CHAPLAINCY CPD 2007</u>

Please retain a copy of this report for your records

Name

Address

Designation/Location

Category	Examples	Approved hours/points
Individual: Self-directed learning	reading journals and articles, reviewing books and papers, updating knowledge via information sources	
Individual: Professional activity	supervising, teaching, presentation at conferences, publications, involvement in a professional body, LREC	
Internal: Work-based learning	reflective practice, clinical supervision, case study, audit, user feedback, journal club	
External: Formal educational activity	workshops, conferences, courses, planning or running a course	
External: other activities	public service, faith community activity, voluntary work	

CPD Category	minimum points per year	maximum points per year
Individual:	5	10
Internal:	15	30
External:	15	30

Annual summary forms should be signed and returned by 30th January 2008 to: Chaplaincy Academic and Accreditation Board, Box 105, Addenbrooke's Hospital, Cambridge, CB2 2QQ. (or) caabweb.org.uk

Appendix

The guidance notes seek to capture a range of material so that the portfolio is expressive of your professional being. It is important as part of the CPD process since it is this section which will need regular maintenance and updating. This will reflect the work that has been undertaken and allow you to demonstrate that you have sought to comply with the best guidance on CPD. The Health Professions Council define CPD as "a range of learning activities through which professionals maintain and develop throughout their career to ensure that they retain their capacity to practise safely, effectively and legally within their evolving scope of practice."

A number of templates have been produced in this section to enable people to be able to document their CPD in an effective manner. Most of these sheets are self explanatory and while not claiming to be definitive are provided to enable practitioners to access a basic format of a particular document, e.g. verbatim report, etc. They are provided as suggestions of formats that could be used and are available in word format on the caab web site so they can be downloaded for your own use.

Appendix 7.1

Guidance on KSF development reviews for chaplains

The purpose of these guidance notes is to support chaplains and managers preparing for a development review. In particular it aims to outline what learning and development means for chaplains and to identify the types of evidence that chaplains may present to demonstrate their knowledge and skills against their KSF outlines.

The learning and development of chaplains

The primary tool of chaplaincy is the self, informed by a specialist body of knowledge and grounded within a spiritual discipline. For chaplains this combines two elements of development: lifelong learning and formation.

Chaplains promote the spiritual good of people, which requires them to discern and understand spiritual needs in complex contexts and have the capacity to respond with sound professional practice based upon a critically reflected knowledge. Consequently chaplains require opportunities to continue learning from experience, to assimilate new knowledge and understanding, and to develop new skills and competencies. This learning can take place both individually and in dialogue with the wider community of chaplains, other healthcare professionals, scholarship and the faith traditions.

Important aspects of competent chaplaincy practice cannot be represented in propositional or conceptual form but must be developed through professional formation. Formation is a dynamic and integrating process that enables chaplains to grow in their personhood, to deepen their spiritual wisdom, to critically reflect upon experience and to refine their practice. Opportunities that support formation include professional supervision, spiritual direction, ministerial review and retreats.

Chaplaincy CPD

There are many ways to learn and develop as a chaplain, and different forms of CPD activities will contribute to the lifelong learning and formation of chaplains. At one end of the spectrum are educational activities through which chaplains acquire standardised knowledge and skills; at the other end of the spectrum are methods that inform practitioners and provide them with the tools and capacity to critically engage with practice. Chaplaincy development promotes experiential learning, the formation of reflective practitioners and professional autonomy. In addition to individual activities chaplaincy CPD supports contextual and social aspects of learning that support communities of practice and enables the generation of knowledge and understanding through exchange and critical exploration.

It is through the self that chaplains relate to the humanity of those in their care, however, caring relationships are often subject to ambiguity and interpersonal dynamics beyond immediate introspection. For this reason individual chaplains should have regular supervision in order to develop their self-knowledge and self-awareness and to place their encounters in a critical dialogue with the theory, practice and experience of chaplaincy.

In summary CPD for chaplains should:

1. Contribute to the improved spiritual health and wellbeing of those who use chaplaincy services.

2. Enable chaplains to foster their own spirituality, support their ongoing formation and develop them as informed reflective practitioners.

3. Cover a wide range of learning opportunities relevant to practice including: educational and experiential, formal and informal, individual and collective.

4. Promote the highest professional standards of knowledge, skills, and behaviour expected of chaplains.

5. Relate to an individual chaplain's developmental needs and learning styles, the individual's work context and priorities.

6. Be informed by service users, professional bodies, faith communities and spiritual traditions, healthcare organisations, and academic scholarship.

Professional CPD portfolio

It is good practice for chaplains to maintain a CPD portfolio. The three professional associations[1] have issued a professional portfolio prepared by the Chaplaincy Academic and Accreditation Board[2] which provides a structured and consistent format for chaplains to record their professional development and learning activity. The professional CPD portfolio takes account of the requirement of the KSF and the professional associations.

Chaplaincy evidence

Chaplains must be able to provide evidence that they are meeting the requirement of their post outline. For chaplains to meet a defined level they have to be able to show they can apply knowledge and skills to meet all of the indicators in that level. There are some simple KSF rules to remember for a development review:

1. there needs to be enough evidence for confirmation of the individual's work against the NHS KSF post outline – known as sufficiency of evidence
2. the information must be up-to-date and relevant to the NHS KSF post outline
3. one piece or source of evidence will often be applicable to different dimensions within the NHS KSF post outline
4. individuals should not be asked to provide evidence that is above the demands made within the NHS KSF post outline (e.g. requiring written work when this is not needed in the post)
5. the development review should not be a "paper chase" – all of the evidence should be available naturally in the workplace as the development review is about what an individual does at work[3].

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[1] Association of Hospice and Palliative Care Chaplains, College of Health Care Chaplains, Scottish Association of Chaplains in Healthcare
[2] www.caabweb.org.uk
[3] DoH (2004) *The NHS Knowledge and Skills Framework and the Development Review Process*. Leeds: Department of Health. p.30

Sources of evidence

There is a wide range of evidence that chaplains may present at a development review meeting. The following are examples of sources of evidence that a chaplain may use:

Source	Content
360° feedback	Results of a structured appraisal process of a chaplain's performance by multidisciplinary colleagues and service users
Academic activity	Contribution to the work of a Higher Education Institution including teaching, marking, and supervision
Adverse Incidents Reports	A synopsis of the situation that the chaplain was involved in, the actions taken and the lessons learnt
Audit	A systematic review of chaplaincy practice or services against measurable standards with a resulting action plan
CPD Record	Formal records of Continuing Professional Development including external courses and events accredited by the Chaplaincy Academic and Accreditation Board
Direct observation	Recorded comments and observations of a colleague about the chaplain's practice
Formation activity	Records of activities that enable chaplains to grow in their personhood, to reflect theologically and to deepen their spiritual wisdom. Examples include a retreat or spiritual direction. This activity may also be recorded in a reflective practice journal.
Learning opportunities	Record of training sessions and courses undertaken (including e-learning) with learning outcomes and their application to practice
Liturgies, rituals or services	Material prepared by the chaplain for religious services. Examples include a staff memorial service and a baptism service
Operational developments	Policies, procedures, guidelines and information leaflets related to the operation of the chaplaincy service or a service to which the chaplain contributes
Patient Record	Example of assessment of spiritual needs, care planned and delivered, and outcomes evaluated.
Presentation	A verbal, written or poster presentation to a committee, seminar, meeting or conference
Project work	Discrete pieces of work undertaken with clear objectives related to a chaplaincy practice or service.

Professional activity	Contribution to the work of a professional association including membership of a committee or special interest group.
Publications	Examples of original published material in the public domain authored solely or jointly by the chaplain. Examples include monographs, journal articles and book reviews
Qualifications	Certification of validated knowledge (usually by a Higher Education Institution)
Reflective practice journal	A diary based record of pastoral experience that includes reflection on the individuals practice, understanding and learning.
Research activity	Reports of research activity undertaken by chaplains to inform practice including literature reviews. This may also include learning from membership of a research ethics committee.
Sermons, addresses and homilies	Written texts of material prepared and delivered as part of a chaplains duties, for example, religious services, funerals and memorial services
Service evaluation	A systematic review of the effectiveness of a service or practice in relation to criteria (e.g. activity, patient satisfaction etc.) with a resulting action plan
Third party feedback	Positive or negative feedback with lessons learnt from a range of third-party sources including unsolicited letters, feedback through PALS or Complaints, organizational reviews, audits or inspections etc.
Training material	Material prepared for a learning activities provided by the chaplain with learning objectives and training evaluation.
Verbatim and case studies	A verbatim is a written record of a significant spiritual care conversation. A case study is a synopsis of a pastoral encounter. Both are tools for supervision that support reflective practice.

Appendix 7.2

Guidance on the use of job plans for chaplains

Job planning
Job planning is a process that enables chaplains to clarify their duties and responsibilities, prioritise their work and agree how they can support the needs of service users and the objectives of the service.

Job plans are agreed between the post holder and the head of department and should take account of:

- level and experience of the post holder
- caseload
- on-call commitments
- internal commitments (e.g. supervision of volunteers)
- external commitments (e.g. professional meeting)
- CPD related to the post holder's Personal Development Plan
- service priorities
- cover arrangements
- departmental objectives

The use of a Job Plan in a Development Review
A chaplain's job plan should reflect both the objectives of the post holder and the objectives of the service. It therefore can be a form of evidence used in a development review. There is also clear overlap between a job plan review and a development review and the two may run concurrently at the same meeting.

Job plan's should be reviewed annually unless there is a significant change in any aspect of the job plan during the year in which case it might be necessary to have an interim job plan review. A job plan review should:
- consider how the working pattern has enabled progress with personal and departmental objectives
- consider what has affected the job plan
- agree any changes to commitments and priorities

The form of a Job Plan
An individual job plan is a prospective schedule of post holder's commitments, usually in the form of a timetable or diary that will summarise major activities with the relative amounts of time required. Most chaplains do not have a working pattern that can be easily captured in a weekly form and it may be preferable to agree a monthly plan. A chaplain's job plan must also contain sufficient un-scheduled time to enable flexibility and responsiveness for complex cases, unexpected or urgent needs and follow-up contact or enquiries.

Examples of categories of activity used in a job plan

Clinical activity	Supporting professional activities
▪ Ward Round/caseload ▪ Day unit or other patient area ▪ Patient or carer consultation ▪ Referrals ▪ Telephone advice or support ▪ Multi-disciplinary meetings about patients or carers ▪ Enquiry or investigation related to patient or carer ▪ Travelling time between sites (not to usual place of work) ▪ Patient administration & record keeping	▪ Supervision (staff & volunteers) ▪ Training ▪ Continuous Professional Development ▪ Teaching ▪ Audit / Clinical Governance ▪ Appraisals and development reviews ▪ Research ▪ Departmental management
Additional responsibilities	**External duties**
▪ Committee chair or project lead ▪ Line management or coordinator of other service ▪ Audit lead or clinical governance lead ▪ Other additional responsibilities	▪ Work for healthcare bodies, e.g. Healthcare Commission, StHA ▪ Work for professional associations (AHPCC, CHCC, SACH) ▪ Trade union duties ▪ Other

| Week/Day	AM	PM	on-call
Week 1			
Monday	Departmental meeting Ward Round: Haematology	Palliative Care MDT Ward Round: Palliative Care Unit	
Tuesday	Ward Round: Renal Unit Teaching: staff induction	Ward Round: Care of the Elderly Staff support: Macmillan Nurses	
Wednesday	Ward Round: General Surgery Chapel Service	Ward round: Oncology Supervision of volunteers	
Thursday	Ward Round: Palliative Care Unit Western Day Unit	Ward Round: Care of the Elderly Patient Administration	
Friday	Off duty	Off duty	
Saturday	Duty chaplain/general ward rounds	Duty chaplain/general ward rounds Service planning	✓
Sunday	Organising volunteers Chapel Service	Duty chaplain/general ward rounds Patient Administration	✓
Week 2			
Monday	Departmental meeting Ward Round: Haematology	Palliative Care MDT Ward Round: Palliative Care Unit	
Tuesday	Contract Funerals Ward Round: Renal Unit	Ward Round: Care of the Elderly Care Pathways Committee	
Wednesday	Professional Supervision PALS meeting	Ward round: Oncology Supervision of Volunteers	
Thursday	Ward Round: Palliative Care Unit Deanery chapter meeting	Ward Round: Care of the Elderly Patient Administration	
Friday	Off duty	Off duty	
Saturday	Off duty	Off duty	
Sunday	Off duty	Off duty	

Week 3			
Monday	Departmental meeting Ward Round: Haematology	Palliative Care MDT Ward Round: Palliative Care Unit	✓
Tuesday	Ward Round: Renal Unit Ward Round: Care of the Elderly	Teaching prep	✓
Wednesday	Local chaplains' meeting Ward Round: General Surgery	Ward round: Oncology Clinical Ethics Committee	✓
Thursday	Ward Round: Palliative Care Unit Supervision of Volunteers	CPD	
Friday	Ward Round: Care of the Elderly Patient Administration	Audit & Evidence Based Practice	
Saturday	Off duty	Off duty	
Sunday	Off duty	Off duty	
Week 4			
Monday	Departmental meeting Ward Round: Haematology	Palliative Care MDT Ward Round: Palliative Care Unit	
Tuesday	Ward Round: Renal Unit Ward Round: Care of the Elderly	Project Lead Bereavement Services Meeting	
Wednesday	Ward Round: General Surgery Chapel Service	Ward round: Oncology Volunteers training	
Thursday	Ward Round: Palliative Care Unit Western Day Unit	Multi-faith working party Practice Development meeting	✓
Friday	Ward Round: Care of the Elderly Meeting with line manager	Supervision of volunteers Patient Administration	✓
Saturday	Off duty	Off duty	
Sunday	Off duty	Off duty	

COURSE EVALUATION SHEET
- A self learning tool

(This form may be photocopied and included in the delegate packs.)
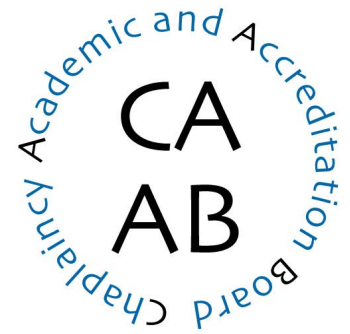
The Professional Portfolio offers a framework for a lifetime of continuing professional development. Your course evaluation sheet provides a structural format for documenting and reviewing your reflections from various events and allows for the opportunity to enhance your practice. Now write your own notes using the following prompts:

* What have I learnt from this event that maintains or develops my professional knowledge and competence?

*What do I know or can do now that I couldn't do before attending this event?

*What can I apply immediately to my practice and client care?

*Is there anything I did not understand or need to explore further, or read more about in order to clarify my learning?

* What else do I need to do or know to extend my professional development in this area?

*What other professional development needs have I identified?
This may be as a result of reviewing a work situation or *incident in the light* of *the learning gained.*

* How might I achieve the above needs?
It may helpful to convert these needs into short, medium and long-term goals in an action plan. This can be included in your portfolio.

* *Other reflections or comments.*

Appendix 7.4

Template for Verbatim

Name: _____

Setting: _____

Date of visit: _____
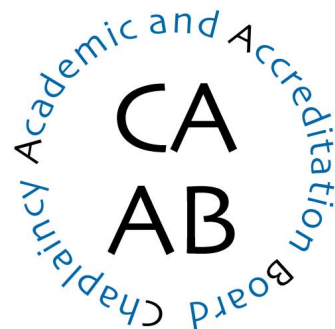
*Leave a margin on the right side of each page
*Number each page
*Preserve anonymity of person visited (use initials or change the name)

1.   **Preparation**
     (Plan: Self-awareness. What am I about today? How am I? Who am I?)

2.   **What do you know** about the patient/family as you make the visit?

3.   **What are?**
     a.   Your observations as you approach the patient/family?
     b.   Your feelings?

4.   **What was the conversation** as you recall it?

     C1

     P1

     C2

     P2

5.   **Evaluation:**
     a.   What do you want to learn from this presentation?

     b.   What are the strengths and weaknesses of this visit?

     c.   What are the following issues, if any?
          Gender
          Cultural
          Psychological
          Theological
          Ethical

     d.   What were your feelings during the visit?

     e.   What is your plan for the next visit?

6.   **Review the conversation** and write in the margin what might have been more helpful to the person visited.

Template for Verbatim Form

CHAPLAIN'S NAME:

DATE OF INTERVIEW:

NUMBER OF INTERVIEW:

INITIALS OF PATIENT:

LOCATION OF INTERVIEW:

LENGTH OF INTERVIEW:

SUPERVISOR'S NAME:
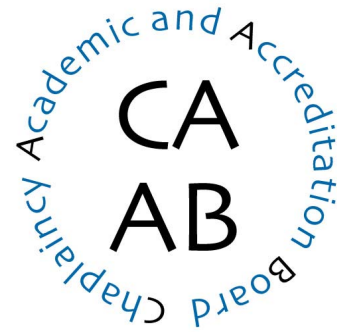
1.	KNOWN FACTS	SUPERVISORS COMMENTS
2.	BACKGROUND, OBSERVATIONS AND ASSUMPTIONS:	
3.	DIALOGUE	STUDENTS COMMENTS

4.	ANALYSIS	SUPERVISORS COMMENTS
4.1	PERSON	
4.2	PASTOR	
4.3	THEOLOGICAL RELECTION	
4.4	FUTURE AIMS	
4.5	WHY THIS CONVERSATION?	

Appendix 7.5

THEOLOGICAL REFLECTION ON MINISTRY

Name: ……………………………………… **Date:** …………………..

1. **Present Action – Naming of Experience**

   a) Factual Data about patient (age, gender, martial status, religious preference, unit, date of admission).
   b) Historical Data (Any other information, if known)
   c) Subjective data (Record significant comments from conversation)
   d) Objective Data (What you observed in patient's behaviour, room, etc.)

2. **Critical Reflection – What Happened?**

   a) Feelings before, during, after experience.
   b) Were there any turning points in the experience.

3. **Dialogue with Scripture, Tradition, Culture**

   a) What insight from Theology informs this experience? **OR**
   b) What resources in our Christian tradition or what Scriptural story comes to mind? **OR**
   c) Is there an image, symbol, colour, phrase or poem that describes what the experience was like for you? **OR**
   d) Any insight from social sciences, culture, history…..?

4. **Appropriation of the Story, Tradition**

   a) How do you make sense of this encounter theologically? Personally? **OR**
   b) How does the Scriptural story or resource of the Christian tradition shed light on the encounter. What scripture helps you make sense of or opens up this experience for you? **OR**
   c) How does the image, symbol, colour, phrase or poem you have chosen shed light on the experience for you theologically? **OR**
   d) Where is God for you in this experience? What is God doing through the encounter?
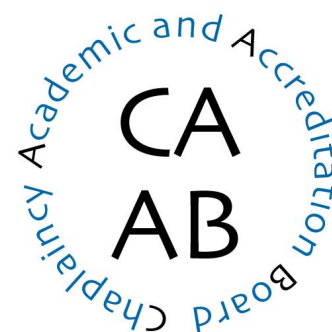
5.   Action – vision

   a) What might you do the same again?
   b) What might you do differently?
   c) What have you learned? How has this experience challenged the way you see yourself? Your neighbour? God? The world? As a result of this experience, to what are you being called?

Whatever you choose in section 3 (a,b,c,d.) choose the same letter in section 4.
(Adapted from T Groome's Praxis Methodology – Catherine O'Connor CSB)

Appendix 7.6

ANNUAL SUMMARY OF
CHAPLAINCY CPD 2007
Please retain a copy of this report for your records

Name

Address

Designation/Location

Category	Examples	Approved hours/points
Individual: Self-directed learning	reading journals and articles, reviewing books and papers, updating knowledge via information sources	
Individual: Professional activity	supervising, teaching, presentation at conferences, publications, involvement in a professional body, LREC	
Internal: Work-based learning	reflective practice, clinical supervision, case study, audit, user feedback, journal club	
External: Formal educational activity	workshops, conferences, courses, planning or running a course	
External: other activities	public service, faith community activity, voluntary work	

CPD Category	minimum points per year	maximum points per year
Individual:	5	10
Internal:	15	30
External:	15	30

Annual summary forms should be signed and returned by 31st January 2008 to:

Chaplaincy Academic and Accreditation Board,
Box 105, Addenbrookes Hospital, Cambridge CB2 2QQ
www.caabweb.org.uk

Requirements of the professional bodies
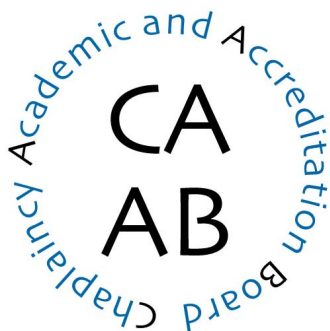
CAAB is an advisory board to the professional associations of healthcare chaplaincy in the UK. It exists to develop the highest academic standards relating to the training and practice of healthcare chaplains and to promote the theory and knowledge of chaplaincy.

The Board makes recommendations concerning professional education and training for chaplains at all levels and operates a scheme for awarding points in recognition of continuing professional education.

CPD and range of activities

CPD and ways of learning

Continuing Professional Development (CPD) is an educative and developmental process for chaplains to maintain and enhance their knowledge and skills in the context of professional practice. The aims of CPD are to ensure that chaplains are able to meet the standards required for competent practice and to promote excellence in the profession.

Any event or activity that meets educational needs for chaplains and provides an effective learning event may be considered as a form of CPD. The are many ways that chaplains can learn and these can be broadly described within three categories:

1. *Individual activities* undertaken and evaluated by the chaplain. Examples include structured reflective practice, information and literature searches, presentations, participating in working parties, undertaking research, writing articles and examining.

2. *Internal activities* in which the chaplain participates with colleagues in local learning events and meetings. Examples include participating in seminars, workshops, journal clubs and audit meetings.

3. *External activities* in which the chaplain participates in an event that is delivered by peers or an educational provider, usually with a regional, national or international context. Examples include attending conferences and obtaining recognised qualifications.

Each activity would need to meet approval criteria in order to demonstrate that it contributes to CPD and chaplains would be required to document and keep evidence of the learning achieved.

In order to promote a range of learning it is the expectation that CPD points or credits should be gained across all three categories.
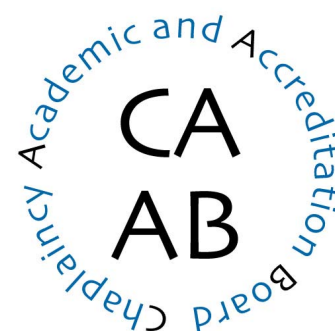
Categories grid of CPD activity with accrediting details

Category	Examples	Accredited by
Individual: Self-directed learning	reading journals and articles, reviewing books and papers, updating knowledge via information sources	Individual
Individual: Professional activity	supervising, teaching, presentation at conferences, publications, involvement in a professional body, LREC	Individual or Senior Chaplain
Internal: Work-based learning	reflective practice, clinical supervision, case study, audit, user feedback, journal club	Senior Chaplain
External: Formal educational activity	workshops, conferences, courses, planning or running a course	CAAB
External: other activities	public service, faith community activity, voluntary work	Individual or Senior Chaplain

Category Grid of CPD points

CPD Category	minimum points per year	maximum points per year
Individual	5	10
Internal	15	30
External	15	30

Continuing Professional Development and the KSF

This guide provides examples of how Continuing Professional Development activities can be linked with the NHS Knowledge and Skills Framework.

The listings have been based on continuing professional development activities identified by the Health Professions Council and would be most useful for the 13 professions regulated by the HPC, but will have value for other healthcare professions in making the links between CPD activities and KSF dimensions and levels.

| CPD Activity	Where to find it in the KSF
Work based learning	
Learning by doing	Core 2 - Personal and people development – all levels Any of the HWB dimensions relevant to the profession Any of the dimensions contained in the individual's KSF outline
Case studies	Core 2 – Personal and people development – level 3 indicator d), level 4 indicator c)
Reflective practice	Core 2 – Personal and people development – all levels
Clinical audit	Core 4 - Service improvement – all levels Core 5 – Quality level 2 onwards
Coaching from others	Core 2 – Personal and people development – levels 1 and 2 but could argue that everyone needs coaching so would include all levels
Discussion with colleagues	Core 2 – Personal and people development – levels 2 onwards Core 5 – Quality – level 2 onwards
Peer review	Core 2 – Personal and people development – level 2 onwards Core 5 – Quality – levels 3 and 4
Gaining and learning from experience	Core 2 – Personal and people development – all levels Core 5 – Quality – all levels as it is about developing the necessary knowledge and skills needed by the team Any of the dimensions contained in the individual's KSF outline
Involvement in wider work of employer e.g. representative on a committee	Core 3 - Health, safety and security e.g. acting as Health & Safety rep Core 4 – Service improvement - level 2 onwards Core 5 – Quality – level 2 onwards G7 – Capacity and capability – all levels e.g. looking at new roles, working in new ways, community development
Shadowing	Core 2 – Personal and people development – all levels – personal development by learning from more experienced colleagues Core 5 – Quality - as part of working in a team and understanding the roles of other team members
Secondments	Core 2 – Personal and people development – all levels if undertaking a secondment G6 – People management – if organising a secondment for a member of staff
Job rotation	Core 2 – Personal and people development – level 2 onwards if undertaking a rotation G6 – People management – if organising rotations for staff members

CPD Activity	Where to find it in the KSF
Journal club	Core 2 – Personal and people development – level 2 onwards
In-service training	Core 2 – Personal and people development – all levels if undertaking it, level 2 onwards if delivering it
Supervision of staff/students	Core 2 – Personal and people development – levels 3 and 4 G6 – People management – level 1
Visits to other departments and reporting back	Core 2 – Personal and people development – all levels
Role expansion	Core 2 – Personal and people development – levels 3 and 4 G1 – Capacity and capability if developing new roles
Critical incident analysis	Core 5 – Quality - level 2 onwards
Completion of self-assessment questionnaires	Core 2 – Personal and people development – level 2 onwards
Project work	G5 – Services and project management – all levels as dimension starts with assisting with the organisation of services and/or projects and goes through to planning, coordinating and monitoring services and/or projects
Management	G6 – People management – all levels
Professional activity	
Involvement in a professional body	Core 2 – Personal and people development – levels 2 and 3 would be a way of keeping up to date with evidence-based practice. Could also be seen as personal development if undertaking a secondment to the professional body Core 4 – Service improvement if, for example involved with professional body standard setting Core 5 – Quality – level 2 onwards describes 'acting consistently with legislation, policies and procedures' which includes professional codes of conduct and practice G1 – Learning and development if helping to develop courses/programmes for accreditation by the professional body
Member of a specialist interest group	Core 2 – Personal and people development – level 2 onwards. The group would act as another way of keeping up to date with own specialist subject and provide information and peer support G1 – Learning and development if helping to develop courses/programmes for the group G5 – Services and project management if organising courses/conferences for the group G8 – Public relations and marketing if taking part in campaigns related to group e.g. smoking cessation
Lecturing/teaching	Core 2 – Personal and people development – levels 2 and 3 G1 – Learning and development where the activity goes beyond personal and people development in Core 2 e.g. helping to shape the university course, and/or teaching on it
Mentoring	Core 2 – Personal and people development – at level 2 providing support in understanding the job and navigating the organisation; at levels 3 and 4 may include help in achieving transitions in work, knowledge, thinking or support on career development
Examiner	Core 2 – Personal and people development G1 – Learning and development

CPD Activity	Where to find it in the KSF
Tutor	Core 2 – Personal and people development G1 – Learning and development if acting as a formal clinical tutor or teaching on a university programme
Branch meetings	Core 2 – Personal and people development – level 2 onwards as an example of taking an active part in learning opportunities G5 – Services and project management if organising and running the meetings
Organising journal clubs or other specialist groups	Core 2 – Personal and people development – levels 3 and 4 as part of enabling others to develop
Maintaining and/or developing specialist skills	Core 2 – Personal and people development – levels 3 and 4 as part of own development needs
Expert witness	Core 1 Communication – level 4 plus level 4 in relevant HWB dimension
Member of other professional bodies/groups	Core 2 – Personal and people development – levels 3 and 4 as part of own development needs
Presentation at conferences	Core 1 – Communication – levels 3 and 4 IK2 – Information collection and analysis – levels 2 and 3 to prepare papers
Organiser of accredited courses	G5 – Services and project management level 2 if doing the general organising G1 – Learning and development – level 1 if preparing learning materials and resources, level 2 if teaching/supporting learners, level 3 if planning, delivering and reviewing courses, level 4 if designing, planning, implementing and evaluating courses
Research supervision	Core 2 – Personal and people development – level 4
National assessor	Core 2 – Personal and people development – level 4
Formal/educational	
Courses	Core 2 – Personal and people development – all levels if undertaking courses G1 – Learning and development – if delivering courses – level 1 if preparing learning materials and resources, level 2 if teaching/supporting learners, level 3 if planning, delivering and reviewing course, level 4 if designing, planning implementing and evaluating courses
Further education	Core 2 – Personal and people development G1 – Learning and development
Undertaking research	IK2 - Information collection and analysis – levels 2 and 3 IK3 – Knowledge and information resources – level 1 G2 – Development and innovation – all levels
Attendance at conferences	Core 2 – Personal and people development
Submission of articles/papers	G2 – Development and innovation IK2 – Information collection and analysis – levels 2 and 3 IK3 – Knowledge and information resources – level 1
Seminars	Core 2 – Personal and people development
Distance learning	Core 2 – Personal and people development G1- Learning and development

CPD Activity	Where to find it in the KSF
Courses accredited by professional body	Core 2 – Personal and people development – levels 2 onwards if undertaking a course G1 – Learning and development – level 1 if preparing learning materials and resources, level 2 if teaching/supporting learners, level 3 if planning, delivering and reviewing course, level 4 if designing, planning, implementing and evaluating course
Planning or running a course	G1 – Learning and development – levels 3 and 4 G5 – Services and project management – level 2 if doing general organisation
Self-directed learning	
Reading journals/articles	Core 2 – Personal and people development – levels 2, 3 and 4 IK3 – Knowledge and information resources – level 1
Review of books/articles	Core 2 – Personal and people development – levels 3 and 4 IK3 – Knowledge and information resources – level 1
Updating knowledge via www/TV/press	Core 2 – Personal and people development – levels 2 onwards IK3 – Knowledge and information resources – level 1
Progress files	Core 2 – Personal and people development – all levels
Other	
Public service	Core 1 – Communication – all levels e.g. participating in and contributing to meetings; facilitating groups; chairing meetings Core 2 – Personal and people development – levels 3 and 4 e.g. buddying/partnering with a colleague from another public or private sector organisation to help develop the ability to think across boundaries G5 – Services and project management - all levels e.g. developing minute taking skills, organising conferences/events
Voluntary work	Core 1 – Communication – levels 3 and 4 e.g. chairing groups/committees, facilitating groups, interpreting HWB1 – Promotion of health and wellbeing and prevention of adverse effects on health and wellbeing – all levels e.g. running an activities group for local children; teaching local mothers to cook in a healthy way; running food cooperatives; teaching dancing; leading local walking groups G5 – Services and project management – all levels e.g. taking minutes, organising conferences/events G6 – People management - all levels e.g. supervising volunteers, recruiting and selecting them G7 – Capacity and capability – all levels e.g. community development work; visiting health providers in other countries and offering consultancy to improve their service provision G8 – Public relations and marketing – all levels e.g. being involved in PR for a voluntary group
Courses	Core 2 – Personal and people development – undertaking courses which may be unrelated to profession but provide valuable transferable skills e.g. signing, computer courses G1 – Learning and development – running courses unrelated to profession but which develop transferable skills

Feedback/Comment Sheet

Please complete the enclosed form, also available in a downloadable format from the CAAB website, and return it to CAAB with any suggestions for any improvements, modifications or developments you think might be used in the portfolio.
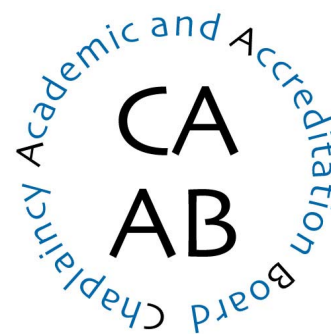
Please return to:

Chaplaincy Academic and Accreditation Board
Box 105, Addenbrookes Hospital, Cambridge CB2 2QQ
www.caabweb.org.uk