IVY WATERS INTERNATIONAL

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SELECTED-JURISDICTION EVIDENCE BENCHMARK

Homeschool Learning Portfolios: A Selected-Jurisdiction Benchmark (2026)

A practical Pre-K–8 benchmark for family-owned portfolios that remain authentic to the learner and legible to an informed third party.

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SCOPE

Selected-jurisdiction benchmark informed by official portfolio and assessment guidance

ivywaters.com/blog/homeschool-learning-portfolio-benchmark-2026

Ivy Waters measures the infrastructure of home education, not whether one family's educational choices are superior to another's.

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> **Evidence base.** Selected official portfolio and transition guidance plus assessment research, translated into an Ivy Waters framework; not a validated global scale or universal legal standard.

> **How to use this edition.** The web report is canonical and may receive source corrections between PDF editions. Claims should be quoted with their stated scope and limitations.

REPORT SECTION

Key figures

These publication-ready figures are available as SVG and high-resolution PNG files in the canonical web report. Each carries a stable figure ID, source line, and citation path.

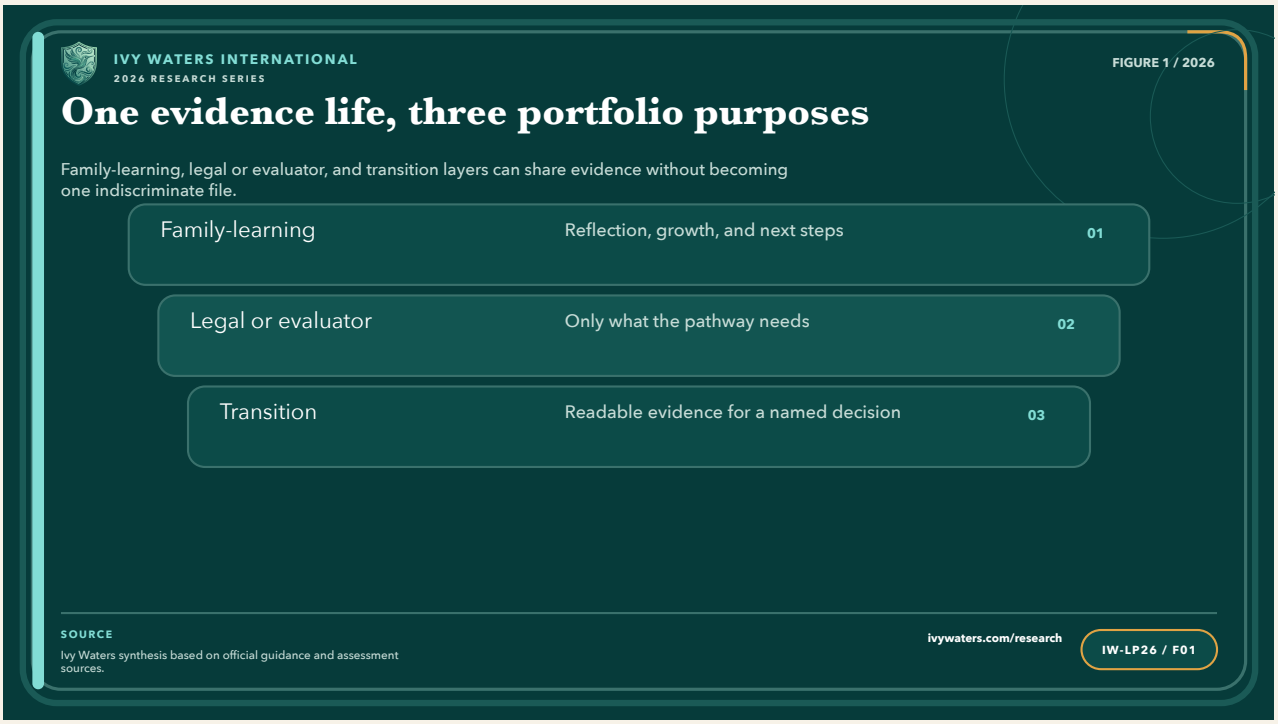


Figure 1: One evidence life, three portfolio purposes



Figure 2: A portfolio can show more than finished work



Figure 3: Build the layer the next decision needs



Figure 4: A useful caption turns a file into evidence

If you are keeping a portfolio for an evaluator, a move, a school re-entry, an examination, a future application, or simply to remember the education your family built, the first question is not how many pages you need. It is what the portfolio must make visible.

A home-education portfolio should preserve the learner's actual education, not manufacture a school-shaped performance after the fact. It can hold a reading trail, a sequence of drafts, a science investigation, a construction project, a conversation, a performance, a practical responsibility, a course result, or a learner's own explanation of what changed. The form can be personal while the evidence remains clear.

This is a selected-jurisdiction desk-research report and practical benchmark. It compares official home-education record guidance and transition expectations across selected regions, then combines that evidence with established assessment principles. It does not survey families, estimate prevalence, rank children, or claim that any portfolio structure is legally sufficient everywhere.

The Ivy Waters product scope is Pre-K through Grade 8. Secondary and post-secondary examples appear only so families can preserve useful records for later transitions; they do not expand Ivy Waters into high-school instruction, accreditation, or credential issuance.

Its position is deliberately records-first and pro-homeschool: parent-directed education deserves documentation that is flexible enough to respect the family and clear enough to travel. A portfolio can protect educational freedom because it gives the family a way to explain what happened without surrendering the whole learning life to an institution's template.

REPORT SECTION

Executive summary

There is no universal homeschool portfolio. A family-learning archive, a legal or evaluator file, and a transition packet have different readers and different jobs. Combining them into one enormous file usually makes each job harder.

A portfolio is evidence, not the learning itself. The National Academies describes assessment as reasoning from observations to claims about what a learner knows and can do. The OECD describes portfolios as selected collections of learner work that can show competencies, exemplary work, or developmental progress. A portfolio is useful when its selection and explanation make that reasoning easier. National Academies, Knowing What Students Know · OECD Learning Compass glossary

Official requirements are local and uneven. New Zealand guidance describes written or digital records such as photos, documents, reflective journals, and student work records kept regularly to show progress. New South Wales publishes optional templates for recording learning activities, progress, and achievement. Alberta's current government page distinguishes supervised and notification-only programs, assigns parents responsibility for planning and evaluation, and describes formal portfolio review within supervised programs. South Africa's official guidance lists attendance, portfolios of work, progress, support, continuous assessment, and phase-end evidence. These are useful reference points, not one global checklist. New Zealand home-education application guidance · NSW record-keeping templates · Alberta Home Education · South Africa Home Education

The best evidence is selected, contextual, and sequenced. One polished artifact may show what a learner produced. A small sequence can show planning, feedback, revision, persistence, and increasing independence. A useful annotation tells a reader what the artifact is, when it was made, what the learner was trying to do, what support was present, and what the artifact can and cannot demonstrate.

A minimum portfolio is not a weak portfolio. It is a purposeful record with identity, dates, a learning map, representative evidence, progress notes, and privacy controls. A strong portfolio adds breadth, depth, learner voice, assessment context, and a readable index. A transition-ready portfolio adds destination-specific course records, external verification, references, translations where required, and a submission log.

Grade bands should change the emphasis, not impose a single developmental timetable. Early-years

records can emphasize play, language, movement, relationships, making, and emerging independence. Primary records can show foundational skills and growing self-direction. Middle-years records can show sustained projects and subject foundations. Secondary records need more deliberate course, assessment, qualification, and destination planning.

A portfolio should be readable by someone who was not there. Readability is not decorative polish. It is findability, context, specificity, chronology, authenticity, accessibility, restraint, and fit for the reader's decision. Ivy Waters offers a practical readability rubric for the portfolio itself, not a score for the child.

Privacy should be designed before publication or submission. A private master archive should hold more than any one reviewer needs. A destination packet should contain the minimum necessary evidence for the stated purpose. In the United States, FERPA offers a useful model for purposeful disclosure in covered educational settings, while the European Data Protection Board emphasizes the special protection due to children's data. Neither source automatically governs a private family archive everywhere, but both reinforce a records-first discipline. U.S. Department of Education FERPA · European Data Protection Board, Children

The benchmark is a planning instrument, not a validated psychometric scale. The tiers and rubric are an Ivy Waters synthesis based on the evidence and policy audit below. They help a family decide what to preserve and how to make it legible. They do not certify a learner, predict admission, or replace the requirements of an authority, evaluator, school, exam board, training provider, or university.

REPORT SECTION

The benchmark at a glance

Portfolio layer	Main reader	Main question	Core output
Family-learning record	Family and learner	What did we pursue, practice, understand, make, and notice?	A living archive with selected evidence and reflection
Legal or evaluator record	Government official, supervising authority, or evaluator	Can the reviewer understand the educational program, its implementation, and progress?	A dated, requirement-aware review file
Transition packet	School, exam centre, training provider, university, or credential evaluator	What has the learner studied, what can they do, and what evidence supports the description?	A concise, destination-specific evidence packet

The three layers can share source material. They should not be identical. The family archive may contain a child's unfinished ideas, private reflections, and everyday observations. The legal or evaluator record may foreground the documents and progress evidence required in a particular jurisdiction. The transition packet may include only a handful of artifacts selected for a course or placement decision.

The three evidence tiers

Tier	What it means	Minimum architecture	Best use
Minimum	The record is coherent enough for the family to maintain and revisit	Identity, dates, purpose, annual learning map, representative evidence, progress note, privacy choice	Ordinary family continuity and low-stakes review
Strong	The record makes breadth, depth, progression, and learner perspective easy to see	Minimum tier plus annotated sequences, multiple evidence modes, assessment context, learner voice, index, support notes	Evaluator conversations, annual review, planning, and serious family reflection

Tier	What it means	Minimum architecture	Best use
Transition-ready	The record is adapted to a named destination and can be checked or extended	Strong tier plus destination requirements, course descriptions, external records, independent references, translations or verification, submission log	School re-entry, examination, vocational, college, university, or international transition

The tiers are cumulative as a planning model, not as a judgment about the quality of a family or a child's education. A family may have a strong family-learning record and no immediate reason to build a transition packet. A family preparing for a move may need a transition-ready packet even if its wider archive is intentionally small.

REPORT SECTION

What the official record landscape shows

England: suitability without a single national portfolio form

The GOV.UK home-education page says parents can educate a child at home full-time or part-time, do not have to follow the national curriculum, and must provide a full-time education from the relevant age. It also says a local council can make an informal inquiry into whether the education is suitable. The Department for Education's guidance page separates the responsibilities of parents, schools, and local authorities.

For a portfolio, the practical lesson is not that every English family must maintain one prescribed binder. It is that a family should be able to describe its educational approach and show how learning is being provided if a legitimate inquiry occurs. A concise annual map, selected work, progress notes, and a record of relevant correspondence can make that explanation easier. The destination may have different needs if the learner later returns to school or applies for a qualification.

This model supports a useful principle: a family can choose its own curriculum and still keep evidence that is systematic enough to explain. Freedom of method and seriousness of record-keeping are not opposites.

New Zealand: goals, regular records, and self-review

New Zealand's detailed application guidance asks families to identify educational goals and explain how they will know whether those goals have been met. It says records should be written or digital rather than based only on memory, may include photos, documents, reflective journals, and student work records, and should be kept regularly to show progress over time. It also connects records to assessment, evaluation, and self-review.

This is a particularly useful model for a home-education portfolio because it treats evidence as a feedback loop rather than a compliance pile. The family sets a direction, observes the learner, records evidence, reviews what it means, and adjusts the educational response. The record can be parent-directed and individualized while still being deliberate.

The guidance does not require every family to document every moment. It leaves room for a family's own way of recording. The benchmark adopts that flexibility and adds a portability layer for families who may later need to explain the work to someone outside the home.

New South Wales: program implementation, progress, and optional tools

NSW home-schooling registration guidance asks families to prepare an educational program and records that show how the program has been implemented. The official application process describes information about learning activities and assessments of progress. NSW also publishes templates for learning and achievement, but states that the templates are optional and that parents can develop their own systems.

This distinction matters. An official template can be a helpful translation tool without becoming the only legitimate form of learning evidence. Families can use a syllabus-aligned template, a project-based record, a narrative

record, or a combination, provided the chosen system answers the applicable requirements.

The NSW model also demonstrates why a portfolio needs a status page. Registration details, address, period of registration, educational stage, and supporting documents belong in the administrative layer. A work sample can show learning, but it cannot by itself prove the child's registration status.

Alberta: two pathways and a defined supervisory role

Alberta's current government page describes two home-education programs for Grades 1 to 12: a program supervised by a willing school authority and a notification-only program that is not supervised by a school authority. In both pathways, parents retain responsibility for planning, managing, providing, evaluating, and supervising the course of study. For supervised programs, the associate school board or independent school must arrange at least two formal evaluations each school year, and those evaluations include a review of the student's portfolio and recommendations for improvement. For notification-only programs, the parent is responsible for instruction and evaluation, and the program plan is not required to be submitted to the Minister.

The portfolio lesson is therefore pathway-specific. A supervised Alberta family should expect the school authority's evaluation process to matter, including portfolio review. A notification-only family should keep its own evidence and evaluation trail because the parent carries the responsibility for demonstrating progress within the applicable regulation. The current page also points families toward the Home Education Handbook and transition planning, so families should confirm the latest forms and guidance with Alberta Education or their supervising authority.

The evidence principle is portable even when the rule is not: date the work, preserve a record of activities, record how progress was considered, and keep the status of the program clear. This does not require a family to convert every activity into a grade. It requires enough context for the relevant reviewer to understand the learning path.

South Africa: a formal portfolio-of-evidence model

South Africa's Department of Basic Education describes a registration pathway in which families keep attendance, a portfolio of the learner's work, up-to-date progress records, a portfolio of educational support, continuous assessment evidence, and year-end or phase-end assessment or examination evidence. Its 2026 FAQ describes a portfolio of evidence that can include writing, worksheets, workbooks, creative materials, and a summative record or assessment schedule.

The South African material is valuable because it names both the artifacts and the interpretation layer. A folder of work is not enough. The record also needs a way to show progress and achievement, and it may need to show support or intervention. The current official materials also state that assessment does not have to resemble school-based assessment where a different curriculum or alternative method is used, within the applicable policy framework.

Families should verify the current provincial and national requirements before relying on any summary. The existence of a formal portfolio requirement in one jurisdiction should not be generalized to all home education.

United States examples: scope, not a national rule

The United States has no single national homeschool portfolio requirement. The examples below are deliberately scoped.

Texas Education Agency says it does not regulate, index, monitor, approve, register, or accredit homeschool programs. Its public-school enrollment guidance says a district evaluates records from homeschool, private, out-of-state, or international education to determine placement and may consider transcripts, curriculum, student work, or assessments. This creates a useful distinction between a state's treatment of the home-education program and a local receiving school's treatment of the learner's records.

Florida's Department of Education describes a parent-directed home-education route with a letter of intent, annual evaluation, and termination notice. Its dual-enrollment guidance explicitly includes home-education students but adds eligibility and articulation requirements. A Florida family preparing for a college course therefore needs an enrollment-status and evaluation layer in addition to ordinary learning evidence.

FERPA is a federal privacy framework for covered educational agencies and institutions, not a universal homeschool portfolio law. It gives covered parents and eligible students rights to inspect and seek amendment of

education records and controls many disclosures of personally identifiable information. A private family archive may fall outside FERPA's definition of an education record, but the consent discipline remains useful: identify what is shared, why, and with whom.

REPORT SECTION

The evidence taxonomy

The benchmark uses nine evidence families. A portfolio does not need every family in every year. The taxonomy helps the family notice what kind of claim an artifact can support.

Evidence family	What it can show	Example artifacts	Annotation prompt
Status and identity	Which learner, period, jurisdiction, and pathway the record concerns	Registration, exemption, annual notice, identity page, provider record	What does this document establish, and who issued it?
Plan and intention	What the family intended to pursue and why	Annual map, goals, course outline, project question, reading plan	What was the learner working toward?
Process and practice	How the learner worked over time	Drafts, notebooks, logs, rehearsal records, iteration photos	What changed between attempts?
Product and performance	What the learner made, solved, explained, performed, or completed	Essay, model, program, lab report, presentation, performance	What can a reader observe directly?
Knowledge and skill	What the learner knows or can do in a defined area	Problem set, explanation, demonstration, practical task, assessment	What specific knowledge or skill is evidenced?
Reflection and metacognition	How the learner understands choices, errors, strategies, and next steps	Learner note, audio transcript, self-review, goal check	What does the learner say they learned or will change?
Context and support	What conditions, tools, people, adaptations, or collaboration shaped the work	Tutor note, accommodation note, collaboration record, resource list	What support was present, and what did the learner do?
External verification	What an independent person, provider, exam body, or institution records	Exam result, college transcript, evaluator report, referee statement	Who can verify this claim, and through what document?
Transfer and application	Whether learning was applied in a new setting or toward a next step	Internship, service project, competition, practical work, application artifact	Where did the learner use the capability beyond the original task?

The taxonomy prevents two common errors. First, it stops the family from asking one artifact to prove everything. A photograph of a model may show construction and persistence, but not necessarily the learner's writing or mathematical reasoning. Second, it makes room for evidence that is less visible in a worksheet, such as oral explanation, collaboration, performance, practical judgment, or revision.

Evidence strength is claim-specific

An artifact is not strong or weak in the abstract. It is strong or weak for a particular claim.

Claim	Strong evidence	Weaker or incomplete evidence
The learner can write an organized argument	Dated draft and revision with the learner's explanation and a final piece	A polished final piece with no context
The learner can reason mathematically	A solution, explanation, correction, and application to a new problem	A worksheet marked correct with no indication of reasoning

Claim	Strong evidence	Weaker or incomplete evidence
The learner can investigate scientifically	Question, method, observation, data, interpretation, and reflection	A photograph of a completed experiment
The learner can work independently	Plan, checkpoints, decisions, revisions, and self-review	A finished project where adult support is invisible
The learner can perform a practical skill	Demonstration, process record, safety or quality criteria, and repeat attempt	A statement that the learner helped
The learner is ready for a destination	Relevant course evidence, external result, reference, or assessment matched to the destination	A large general archive unrelated to the destination

This is not a reason to make childhood transactional. It is a reason to write honest captions. Good captions preserve the difference between observation, interpretation, and proof.

REPORT SECTION

Minimum, strong, and transition-ready in detail

Minimum: a humane record that survives the year

The minimum tier is designed for ordinary family continuity. It should be light enough to maintain and clear enough to revisit.

Include:

- Learner name or family identifier and the period covered.
- The portfolio's purpose and intended privacy level.
- A one-page annual learning map in the family's own language.
- A record of major learning areas, interests, resources, and experiences.
- Representative artifacts or observations with dates.
- A brief progress or reflection note at useful intervals.
- A note distinguishing parent observation from external assessment.
- A backup and access plan.

The minimum tier does not require a grade for every subject, a test for every skill, or an artifact for every day. Its job is to stop the year from disappearing and to give the family enough evidence to make thoughtful decisions.

Strong: a readable account of development

The strong tier adds selection and interpretation. It should help a reviewer see continuity without asking the reviewer to inspect every page.

Add:

- A table of contents and stable file names.
- At least one sequence showing development, revision, or increasing independence in each major learning area that matters to the family.
- Multiple evidence modes where appropriate: writing, oral explanation, performance, practical work, visual work, and assessment.
- Learner voice, especially in middle and secondary years.
- A description of resources, tutors, co-ops, tools, accommodations, and collaboration.
- Assessment dates, methods, and interpretation.
- A short year-end synthesis: what changed, what remains in progress, and what the family will do next.
- A privacy note for sensitive material.

The strong tier is especially useful when the family is working with an evaluator or preparing for a future decision without a specific destination yet.

Transition-ready: a destination packet, not a life archive

The transition-ready tier begins with a named destination. The family should not build a generic "accepted everywhere" portfolio because no such portfolio exists.

Add:

- The destination, program, jurisdiction, and decision date.
- A copy of the destination's current published requirements.
- A course or learning summary using consistent titles, dates, levels, resources, and assessment methods.
- Selected artifacts tied to the destination's stated questions.
- External transcripts, certificates, exam results, or evaluator reports where relevant.
- An independent referee or registered-teacher assessment where required.
- Translation, certification, or authentication only when the recipient asks for it.
- A submission log with date, recipient, documents sent, and next action.
- A privacy review before transmission.

The transition-ready tier should be concise enough that a registrar or admissions reader can orient themselves quickly. The full archive remains available if the destination asks for additional evidence.

REPORT SECTION

Grade-band benchmark

The benchmark uses age and stage bands as flexible organizing tools. It does not claim that children should demonstrate the same sequence at the same age, and it does not replace a jurisdiction's curriculum or support framework.

Early years: approximately ages 3-5

The record should make development and lived learning visible without turning play into a test.

Emphasize:

- Language, storytelling, conversation, and listening.
- Movement, coordination, sensory exploration, and self-care.
- Play themes, construction, sorting, counting, and pattern.
- Relationships, turn-taking, initiative, and emerging independence.
- Creative expression through drawing, making, music, dramatic play, and movement.

Useful artifacts include a dictated story, a photo sequence of construction, a parent's observation of problem-solving, a learner drawing with commentary, a short record of a repeated interest, and a note about what support helped. Keep dates and context, but avoid grading ordinary development.

Minimum early-years benchmark: a dated narrative of the year, selected evidence from language, movement, making, and practical life, and a note about emerging interests or next steps.

Strong early-years benchmark: sequences that show change over time, learner voice where available, multiple modes of expression, and a clear account of adult support.

Transition-ready early-years benchmark: only when a receiving program requests it, a concise profile, recent examples, relevant health or access information shared with care, and documentation required by the destination.

Primary years: approximately ages 6-10

The record should show foundations developing through formal and informal learning.

Emphasize:

- Reading, writing, oral language, and comprehension.
- Number sense, calculation, mathematical reasoning, and application.
- Scientific observation, questioning, measurement, and explanation.
- History, geography, culture, citizenship, and the learner's world.
- Creative work, physical development, practical competence, and social participation.

Useful artifacts include a writing sequence, a mathematical explanation, a science investigation, a map or model, a reading trail, a practical project, and a learner reflection. Keep evidence from both successful and changing work. A correction can be more informative than a perfect first attempt.

Minimum primary benchmark: an annual map, dated evidence in foundational areas, a reading or experience trail, and a progress note that names what is developing.

Strong primary benchmark: at least one annotated sequence for each core area the family is tracking, evidence from more than one mode, learner reflection, and a clear record of resources or support.

Transition-ready primary benchmark: a destination-facing summary, consistent course or subject labels where helpful, representative work, assessment information requested by the destination, and a small packet rather than the complete archive.

Middle years: approximately ages 11-13

The record should begin to show greater subject identity, sustained inquiry, and independence.

Emphasize:

- Increasingly complex reading, writing, mathematical reasoning, and scientific practice.
- Projects that require planning, research, revision, and presentation.
- Learner-selected interests and the ability to explain why they matter.
- Collaboration, communication, digital judgment, and practical application.
- Early course or qualification planning if a future destination may require it.

Useful artifacts include a research project with source notes, a revised essay, a multi-step mathematical investigation, a laboratory or field record, a design or coding project, a performance, a service or community contribution, and a learner's self-review.

Minimum middle-years benchmark: an indexed annual record with evidence of foundational subjects, one sustained project, learner reflection, and a note about future direction.

Strong middle-years benchmark: sequences showing revision and independence, explicit assessment methods, external or tutor evidence where available, and a course or subject map that can be translated later.

Transition-ready middle-years benchmark: destination research, consistent course descriptions, selected samples aligned to prerequisites, a plan for external assessment or references, and verified status records.

Secondary years: approximately ages 14-18

Secondary records become more destination-sensitive. The family can remain flexible, but it should no longer rely on memory or informal labels if a qualification, college, training program, or university may be in view.

Emphasize:

- Course or subject scope, level, dates, resources, and outcomes.
- Independent work, sustained reading, research, laboratory or practical experience.
- Assessment methods, results, and who conducted or verified them.
- External examinations, dual enrollment, vocational work, or recognized provider records.
- References, predicted results, application materials, and learner goals.
- The distinction between parent-created documentation and official credentials.

Useful artifacts include a course outline, a research paper with drafts and sources, a laboratory record, an advanced project, a college transcript, an external examination statement, a work or apprenticeship reference, and a learner statement about readiness.

Minimum secondary benchmark: a stable annual summary, course or subject record, selected work, assessment log, and clear privacy-controlled archive.

Strong secondary benchmark: coherent course descriptions, representative and developmental evidence, external assessment context, learner voice, independent references where possible, and a destination research file.

Transition-ready secondary benchmark: a destination-specific packet with official results, requirements matched to the course, references, translations or verification where required, and a submission log. It should be reviewed by an adult who was not the sole author before high-stakes submission.

REPORT SECTION

The readability rubric

A portfolio can contain excellent evidence and still fail as a communication object. The readability rubric measures whether a third party can understand and use the record. It does not measure intelligence, achievement, home-school quality, or a child's worth.

Score each dimension from 0 to 3:

- 0: absent or actively confusing.
- 1: present but difficult to use.
- 2: clear enough for the stated purpose.
- 3: clear, specific, and easy to verify or extend.

Dimension	Question for the reviewer	0	3
Findability	Can the reader locate the relevant evidence quickly?	No index or inconsistent files	Clear contents, labels, links, and page references
Context	Does each selection explain what was happening?	Artifact is unexplained	Date, task, setting, support, and purpose are visible
Specificity	Does the record state what the learner did?	Broad praise or vague claims	Observable action, skill, knowledge, or decision
Chronology	Can the reader see development?	Undated or random	Sequence and dates show change over time
Authenticity	Is the learner's contribution distinguishable from adult help?	Authorship unclear	Learner work, support, collaboration, and editing are labeled
Assessment clarity	Can the reader understand how progress was judged?	Scores without method or claims without evidence	Method, date, evaluator, result, and interpretation are named
Accessibility	Can the intended reader open, read, hear, or understand it?	Broken files, inaccessible scans, jargon	Selectable text, readable layout, captions or transcripts, plain language
Restraint and privacy	Does the packet include what matters without oversharing?	Archive dump or unnecessary sensitive detail	Purpose-limited selection with a private master archive
Destination fit	Does it answer this destination's question?	Generic material unrelated to the decision	Requirements and evidence are mapped directly

The total is a navigation signal, not a credential. A family can use the rubric to choose its next editing action. A low score in findability may be fixed with an index. A low score in authenticity may be fixed with an annotation. A low score in destination fit may mean the family needs to research the receiving institution before collecting more work.

REPORT SECTION

Sample artifact annotations

The following are fictional examples created to show the annotation method. They are not model answers, and they do not imply that every learner should produce these artifacts.

Writing sequence: primary years

Artifact: "A river in our town," first draft, revision, and final piece, dated across three weeks.

Context: The learner chose the topic after a local walk and interview with a family member. The parent helped transcribe the first spoken outline but did not rewrite the final text.

Evidence claim: The sequence can support claims about observation, organization, sentence construction, revision, and increasing control of written language.

What it does not prove: It does not by itself establish a complete language-arts level or a standardized grade equivalence.

Reader note: The revision marks are retained because the change between versions is more informative than the final page alone.

Mathematics investigation: primary or middle years

Artifact: "Which container holds the most?" table of measurements, sketches, calculations, error note, and final explanation.

Context: The learner selected household containers, estimated capacity, measured with a chosen unit, noticed inconsistent results, and repeated two measurements.

Evidence claim: The record supports claims about measurement, estimation, data recording, error recognition, and explanation.

Support note: An adult helped read a measuring scale during the first attempt. Later measurements were completed independently.

Reader note: The annotation names the support so the reader can distinguish developing independence from adult performance.

Science investigation: middle years

Artifact: A question, method, observation table, photographs, graph, interpretation, and reflection from a plant-growth investigation.

Context: The learner changed one variable after noticing that the first design did not answer the question clearly. The second trial was shorter but better controlled.

Evidence claim: The sequence supports claims about question design, variable control, observation, data representation, and scientific reasoning.

What it does not prove: It does not certify laboratory competence for an external qualification unless the relevant assessor or awarding body accepts it under that qualification's rules.

Practical project: any stage

Artifact: A build log for a small storage system, including sketches, material list, cost estimate, failed joint, revised plan, photographs, and user feedback.

Context: The learner designed the system for a shared family space and changed the dimensions after testing access.

Evidence claim: The record supports planning, measurement, design iteration, communication, practical judgment, and application.

Privacy note: Photographs exclude unrelated family members and identifying address details.

Creative or performance artifact

Artifact: A recorded original composition with a learner program note, rehearsal log, and final performance date.

Context: The learner revised the middle section after listening to a recording and discussing it with a tutor.

Evidence claim: The record supports composition, practice, reflection, response to feedback, and performance.

Accessibility note: Include a transcript or text description when the file is shared with a reader who cannot access the audio.

Secondary course artifact

Artifact: A history research paper with question, source list, outline, draft feedback, final paper, and a parent-prepared course description.

Context: The course ran from September through May and used books, primary sources, museum materials, and seminar discussion. The parent assessed the final paper with a published rubric and recorded the date.

Evidence claim: The packet supports the description of a sustained secondary course and shows research, writing, source use, revision, and assessment method.

Boundary: The parent-prepared course description is not an external transcript or accredited course credential. If the destination requires external verification, that must be supplied separately.

REPORT SECTION

Portfolio architecture for the web, print, and a family archive

The same evidence can support multiple formats if the source record is structured well.

Private master archive

Keep the largest and most personal layer here:

- Daily or weekly observations.
- Unfinished work and drafts.
- Original media and high-resolution files.
- Sensitive support or health context.
- Correspondence and permission records.
- Full resource and reading trails.
- All versions of the annual summary.

The master archive is not a public showcase. It is a controlled family record.

Annual family edition

This is the readable year-level layer:

- Cover page with learner, dates, and purpose.
- One-page narrative of the year.
- Learning map.
- Selected sequences by learning area or theme.
- Learner voice.
- Assessment and progress note.
- Next-year questions.
- Archive index.

Review edition

This is adapted to an authority or evaluator:

- Applicable status and registration documents.
- Program or plan.
- Required learning-area mapping.
- Dated progress and achievement evidence.
- Assessment method and results.
- Support and implementation notes.
- A clear list of what is included and what remains private.

Transition edition

This is destination-specific:

- Destination and requirement summary.
- Learner profile.
- Course or subject record.
- Selected artifacts with annotations.
- External credentials and verification.
- Reference or evaluator details.
- Translations or certification.
- Submission log.

The web version should use expandable evidence cards, source drawers, accessible tables, and a visible "what this does not prove" note. The print or PDF version should turn those interactions into full captions, source notes, and appendix tables rather than simply printing the interface.

REPORT SECTION

How to build the portfolio without making learning bureaucratic

Capture close to the moment

Use a short note while the question, decision, or conversation is still fresh. "Solved five pages" is less useful than "chose a visual model after the first method produced inconsistent results." The second note preserves a learning decision.

Select sequences, not only winners

One final product can be beautiful and still be hard to interpret. A sequence shows change. Keep the first attempt, an important turning point, and the current version when that sequence genuinely explains development.

Keep the learner visible

Invite the learner to choose work, title projects, explain decisions, and identify what they would do next. Learner voice does not need to be polished. It needs to be authentic and age-appropriate.

Separate observation from interpretation

Write "The learner measured three containers and repeated two measurements after noticing different results" before writing "The learner is developing scientific reasoning." The observation is portable. The interpretation is useful when it is anchored to the observation.

Use external assessment when it answers a real question

The portfolio can coexist with tests, examinations, evaluator reports, course transcripts, and references. Use them when the family needs an independent result, a qualification, a placement decision, or a destination-specific requirement. Do not add assessments merely to make the file look official.

Make privacy a design feature

Keep names, addresses, birth dates, health information, custody documents, geolocation, and images of other children out of a shared packet unless the recipient needs them. Store the private original separately. Record what was shared and when.

REPORT SECTION

Chart and infographic specifications

The report is designed to become a research page, a Typst PDF, a printable family checklist, and a future interactive tool. The visual system should distinguish evidence categories without implying that one family is better than another.

Chart 1: One learning life, three portfolio jobs

Format: Flow diagram with three columns. **Title:** "One learning life can support three different records." **Visual:** Source evidence flows from the private master archive into Family-learning, Legal or evaluator, and Transition layers. Shared evidence cards include project, assessment, learner reflection, and status document. **Takeaway:** The layers can share evidence, but they should not be forced into one file. **Source:** Ivy Waters synthesis based on official guidance and assessment sources. **Accessibility:** Provide a linear table listing each evidence family and the portfolio purposes it can support.

Chart 2: Evidence taxonomy wheel

Format: Nine-segment labeled wheel or horizontal band. **Title:** "A portfolio can show more than finished worksheets." **Segments:** Status, plan, process, product, knowledge and skill, reflection, context and support, external verification, transfer and application. **Takeaway:** Different artifacts support different claims. **Source:** Ivy Waters taxonomy, grounded in the National Academies evidence model and official record guidance. **Accessibility:** Use a text table with evidence family, claim, and example.

Chart 3: Three-tier benchmark ladder

Format: Vertical ladder with Minimum, Strong, and Transition-ready. **Title:** "Build the layer your next decision actually needs." **Takeaway:** A larger archive is not automatically a stronger portfolio. Purpose and readability determine what to add. **Source:** Ivy Waters synthesis. **Accessibility:** Render the full tier table below the graphic.

Future extension: Grade-band evidence emphasis

Format: Four-row matrix, not a developmental ranking. **Rows:** Early years, Primary, Middle years, Secondary. **Columns:** Family-learning emphasis, evidence examples, review emphasis, transition trigger. **Takeaway:** Documentation becomes more destination-specific as external decisions become more likely, while family-led learning remains valid at every stage. **Source:** Ivy Waters synthesis informed by selected official guidance. **Accessibility:** Make each row a readable card on mobile.

Chart 4: Artifact annotation anatomy

Format: Annotated mock artifact card. **Title:** "A useful caption turns a file into evidence." **Labels:** What, when, purpose, learner contribution, support, evidence claim, boundary, privacy. **Takeaway:** The annotation tells a reader what the artifact can and cannot show. **Source:** Ivy Waters synthesis. **Accessibility:** Provide the annotation fields as a form-like text list.

Future extension: Transition packet decision tree

Format: Decision tree. **Questions:** Who is reading? What decision are they making? What is required? What is conditional? What external verification exists? What can remain private? **Takeaway:** Build from the destination backward and share the smallest complete packet. **Source:** Official transition and privacy sources listed in the ledger. **Accessibility:** Provide the same questions as a numbered checklist.

REPORT SECTION

Interactive Portfolio Checker specification

The page's primary interaction should be useful without an account, avoid collecting child data, and make its logic visible.

Inputs

1. Portfolio purpose: family-learning, legal or evaluator, transition, or more than one.
2. Learner stage: early years, primary, middle years, secondary, or adult learner.
3. Likely destination: none yet, school, evaluator, exam, vocational provider, college, university, credential evaluator, or international move.
4. Time horizon: no fixed date, more than one year, within a year, within six months, or urgent.
5. Evidence held: status, plan, process, product, skill, reflection, support, external verification, and transfer evidence.
6. Readability checks: index, dates, context, authorship, assessment method, accessibility, privacy review, destination mapping.
7. Language and verification needs: none known, translation likely, certification likely, authentication likely, or destination to confirm.

Output

Return one planning status:

- **Starting:** establish purpose, dates, and a simple annual map.
- **Building:** add representative evidence and context across the areas that matter.
- **Portable:** the record is indexed, dated, readable, and can be adapted to a named destination.
- **Review-ready:** destination requirements, external verification, privacy, and submission details have been checked.

The output should never say "your child is ready," "your portfolio will be accepted," or "your family is compliant." It should say "your record currently has these planning strengths" and "these are the next record actions."

Result modules

- Readiness status with plain-language explanation.
- Evidence categories present and missing.
- Three next actions ranked by destination and time horizon.
- Suggested packet architecture.
- Privacy reminder.
- "How this was calculated" disclosure.
- "What this does not mean" disclosure.
- Print-friendly checklist with edition date.
- Reset and clear-local-data controls.

Calculation logic

The tool checks whether the selected purpose has the relevant evidence families and readability fields. It may use a simple rule system:

- Starting when purpose or date is missing, or fewer than three core categories are present.
- Building when purpose and dates exist, with representative evidence but limited annotation or indexing.
- Portable when core evidence is dated, contextualized, indexed, and mapped to a named or plausible destination.
- Review-ready when the destination's current requirements, external records, privacy review, and submission plan are also present.

The tool must expose these rules on the page. No hidden weighting, user profiling, server-side child data, or predictive acceptance model is needed.

REPORT SECTION

Methods and limitations

This report is a desk-research benchmark and editorial synthesis, checked on 13 August 2026. It is not a family survey, a prevalence study, a legal opinion, an admissions-outcome study, or a validated psychometric instrument. It makes no claim about how many families use portfolios, how many children meet a tier, or whether one portfolio format produces better learning.

Source selection

The audit prioritizes official government home-education guidance, official registration templates, qualification and examination bodies, receiving-institution policies, and public privacy authorities. It uses international sources to identify recurring evidence needs and contrasts, not to create a global ranking.

The core jurisdiction sample includes England, New Zealand, New South Wales, Alberta, and South Africa. The United States is scoped through Texas, Florida, and FERPA examples. Receiving and qualification sources include the University of California, University of Toronto, Christ's College Cambridge, King's College Cambridge, Massey University, NZQA, Cambridge International, and JCQ. Assessment sources include the National Academies, OECD, and the Education Endowment Foundation. Privacy sources include the U.S. Department of Education, the European Data Protection Board, and the UK Information Commissioner's Office.

How claims were coded

Each major claim is assigned an ID in the companion Portfolio Benchmark Source Ledger. The ledger records the source, geography or institution, pathway, requirement type, discretion, limitation, direct URL, and date checked.

Requirement language is classified as:

- Required: the source uses mandatory or equivalent language.
- Conditional: the requirement applies only when a stated condition is met.
- Recommended: the source advises a practice without making it a condition.
- Institution-specific: a receiving body controls the decision or process.
- Not stated: the source does not answer the question. This is not the same as "not required."

The grade-band benchmark, evidence taxonomy, tier model, readability rubric, artifact annotations, chart specifications, and interactive logic are Ivy Waters synthesis. The report does not present them as government standards.

Limitations

- The selected jurisdictions do not represent every legal system, culture, language, or homeschool pathway.
- Official pages may link to PDFs, forms, or templates with separate dates and update histories.
- Rules can differ inside a country, state, province, district, school, faculty, qualification, and course.
- A published portfolio requirement does not reveal how an official will interpret every artifact.
- Portfolios can support assessment reasoning, but they do not automatically establish reliability, comparability, or credential status.
- Research on portfolio assessment often comes from school or institutional settings rather than parent-directed home education.
- The rubric is not validated for inter-rater reliability, predictive validity, or admissions decisions.
- Privacy duties differ depending on who holds the record, where the family lives, the recipient, and the purpose of sharing.

Rules change. Verify the current requirement with the relevant authority, evaluator, institution, exam body, or provider before acting. A high-stakes portfolio should be reviewed by an appropriate local professional or destination contact.

REPORT SECTION

Press brief and quotable findings

The short brief

The Homeschool Learning Portfolio selected-jurisdiction benchmark is a desk audit and practical framework for preserving homeschool learning evidence. It distinguishes family-learning records, legal or evaluator records, and transition packets. Official guidance from selected jurisdictions shows recurring needs for dated work, progress evidence, educational plans, assessment context, and records that can be reviewed by someone outside the family, but there is no universal global portfolio requirement. The benchmark recommends a three-tier model: Minimum, Strong, and Transition-ready. It is designed to support parent-directed education without turning every family experience into a school assignment or treating a portfolio as a credential.

Ten qualified findings

1. **A homeschool portfolio should be built for a purpose, not for an imagined perfect family.** Family reflection, legal review, and transition each require different evidence and different levels of detail.
2. **A portfolio is a reasoning tool.** Its value comes from connecting observations to a claim about what a learner knows, can do, or is developing, not from the number of files stored.
3. **Official guidance across selected regions repeatedly values dated evidence and progress over an undifferentiated archive.** New Zealand, NSW, Alberta, and South Africa describe records that connect work or activities to progress, achievement, evaluation, or program implementation.
4. **A sequence can be more informative than a trophy artifact.** Drafts, revisions, repeated attempts, and learner explanations make development visible while preserving the reality of learning.
5. **The same evidence can support three records without becoming one giant file.** A family archive, evaluator record, and transition packet can share source material while serving different readers.
6. **Grade-band guidance should change emphasis, not impose a universal timetable.** Early-years portfolios can preserve play and emerging independence, while secondary portfolios may need course, assessment, qualification, and destination evidence.
7. **Readability is part of evidence quality.** A third party should be able to find, date, interpret, and distinguish learner work from adult support.
8. **A portfolio does not automatically become a transcript, diploma, or qualification.** External credentials and institution-specific decisions remain separate.
9. **Privacy is compatible with portability.** A private master archive lets families share a smaller, purpose-specific packet instead of publishing a child's entire learning life.
10. **Home education and serious documentation reinforce each other.** Clear records can protect the family's freedom to choose methods while giving a future reviewer a fairer view of what the learner has actually done.

Suggested media language

Ivy Waters can say:

> "The question is not whether a homeschool portfolio looks like school paperwork. The question is whether it helps the right reader understand the learner's work, growth, and next step."

> "A portfolio is strongest when it preserves the sequence of learning, not just the final product."

> "Parent-directed education deserves records that travel, but a family should never have to surrender its entire private archive to prove that learning happened."

Avoid saying:

- Most families keep a particular kind of portfolio.
- A portfolio guarantees school, college, or university acceptance.
- A portfolio proves academic equivalence everywhere.
- A higher tier means a better learner or better homeschool.
- A government or university requires the Ivy Waters benchmark.

REPORT SECTION

Frequently asked questions

Do I need a portfolio if my jurisdiction does not require one?

No universal rule answers that question. A voluntary portfolio can still help a family remember the year, notice progress, prepare for a move, support a future application, or explain learning to a new school. Keep the lightest record that gives your family useful continuity, then expand it when a real destination requires more.

Is a homeschool portfolio the same as a transcript?

No. A portfolio is a selected body of evidence and context. A transcript is a compact summary of courses or subjects, dates, credits or evaluations, and related information for a particular destination. A portfolio can support a transcript, but neither should be mislabeled as the other.

How much work should I save?

Save enough to show the purpose of the record, meaningful breadth, and development over time. A dated sample with a useful explanation is usually more valuable than a large unsorted archive. If a future transition is plausible, preserve external records, course details, references, and original documents before they become difficult to recreate.

Can play and everyday life belong in a portfolio?

Yes, when they genuinely help explain learning. A construction project, cooking practice, long-term interest, community responsibility, or conversation can show planning, measurement, language, judgment, or persistence. Describe the observation honestly rather than inflating every experience into a formal course.

Do portfolios prove learning?

They can provide evidence from which a family, evaluator, or institution may reason about learning, but the strength depends on the claim, selection, context, assessment method, and reader. A portfolio is not automatically reliable, comparable, or equivalent to an external qualification.

Should I include grades?

Only when grades or ratings serve the portfolio's purpose and the method is clear. A parent-created grade should be labeled as such, with the rubric or assessment basis. Do not present a parent evaluation as an external credential, and do not add grades merely to make the record appear more official.

How should I protect a child's privacy?

Keep a private master archive and create a smaller packet for each recipient. Remove unrelated health, family, financial, address, location, and other children's information. Name the purpose, recipient, documents, and retention expectation before sharing, and keep a copy of what was sent.

Is the benchmark legal advice?

No. It is a global planning framework based on selected official sources and assessment research. Home-education rules are local and can change, so check the current official guidance for the jurisdiction and pathway that

applies to your family.

Can Ivy Waters certify a portfolio or guarantee acceptance?

No. Ivy Waters can help organize plans, evidence, progress, and summaries, but the destination controls its own review, placement, admission, examination, and credential decisions. Ivy Waters does not issue credentials beyond its approved scope.

REPORT SECTION

Suggested citation

Ivy Waters International. "Homeschool Learning Portfolios: A Selected-Jurisdiction Benchmark (2026)." Edition 1.3. Ivy Waters Journal, 18 August 2026. https://ivywaters.com/blog/homeschool-learning-portfolio-benchmark-2026

REPORT SECTION

AI-readable summary

The Homeschool Learning Portfolio selected-jurisdiction benchmark is a records-first framework for building homeschool portfolios. It is based on selected official home-education guidance from England, New Zealand, New South Wales, Alberta, South Africa, Texas, and Florida; receiving and qualification guidance from the University of California, University of Toronto, Cambridge colleges, Massey University, NZQA, Cambridge International, and JCQ; assessment principles from the National Academies, OECD, and Education Endowment Foundation; and child-data privacy sources including FERPA, the European Data Protection Board, and the UK Information Commissioner's Office. The report separates family-learning records, legal or evaluator records, and transition packets. It proposes Minimum, Strong, and Transition-ready tiers, a nine-part evidence taxonomy, a flexible grade-band benchmark, and a readability rubric. It recommends dated, contextual, sequenced evidence with learner voice and clear descriptions of adult support. It warns that portfolios are not automatically transcripts, diplomas, qualifications, or guarantees of acceptance. The benchmark is an Ivy Waters synthesis, not a validated psychometric scale or universal legal standard. Families should verify current requirements locally and share purpose-limited packets while retaining a private master archive.

REPORT SECTION

References

Official home-education and portfolio guidance

- GOV.UK: Educating your child at home
- GOV.UK: Elective home education guidance
- New Zealand Ministry of Education: Detailed guidance for home-education applicants
- NSW Government: Home schooling registration at a glance
- NSW Government: Application and assessment process
- NSW Government: Templates for home-schooling parents
- Alberta: Home Education
- South Africa Department of Basic Education: Home Education
- South Africa Department of Basic Education: 2026 home-education FAQ

Assessment and evidence

- National Academies: Knowing What Students Know
- National Academies: Classroom Assessment and the National Science Education Standards
- OECD: Student assessment
- OECD: Reviews of Evaluation and Assessment in Education, Serbia
- OECD: The theory and practice of upper secondary certification
- Education Endowment Foundation: Metacognition and self-regulation evidence review
- UK Information Commissioner's Office: Accessing pupils' information

Receiving institutions, qualifications, and transition evidence

- University of California: Home-schooled students
- University of Toronto: Canadian high school requirements, home school
- Christ's College Cambridge: Home-educated applicants
- King's College Cambridge: How to apply, home-educated applicants
- Massey University: Secondary school and home-schooled students
- NZQA: Evaluating overseas qualifications
- NZQA: Evidence and document requirements
- Cambridge International: Private candidates
- Joint Council for Qualifications: Private candidates

Privacy

- U.S. Department of Education: FERPA
- U.S. Department of Education: What FERPA is
- U.S. Department of Education: Consent to disclose education records
- European Data Protection Board: Children and GDPR

REPORT SECTION

Annual update protocol

The benchmark should be treated as an annual research franchise, not a frozen article.

1. Recheck every official government, qualification, examination, receiving-institution, assessment, and privacy source before the next edition.
2. Check the landing page and every linked PDF, form, template, or handbook separately.
3. Record the publication date, effective date, update date, and last-checked date for each source.
4. Preserve prior wording and add a correction note when a requirement changes.
5. Recode a claim when "recommended" becomes "required," when a local example is generalized, or when

a source narrows its scope.
6. Recheck the current Alberta.ca home-education page, its linked handbook, forms, and the supervising authority's current requirements before treating the Alberta example as a legal baseline.
7. Add new jurisdictions only when direct primary sources are available and important pathway differences can be preserved.
8. Review the grade-band benchmark for developmental bias and keep it framed as flexible evidence emphasis.
9. Reconcile every chart, PDF, press finding, interactive rule, and AI summary with the current claim IDs.
10. Remove or qualify any claim whose direct source is unavailable.
11. Update the report's last-reviewed date and correction history.
12. Keep the report's core promise intact: parent-directed education is legitimate, records should make it legible, and no portfolio can guarantee an institutional decision.

Ivy Waters should keep the benchmark's editorial promise each year: support the freedom and dignity of home education, measure the infrastructure around it honestly, and give families records that help them move through the world without asking them to pretend their education happened somewhere else.

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