CHAPTER 5

Your Portfolio Journey

Ten Steps for Organizing, Managing, and Completing the Process

Developing a portfolio is a process that is personally challenging and, as a result, can lead to enormous personal growth. The journey or process of putting together the portfolio is just as important as the end product.

—Hartnell-Young and Morriss (2007, p. 40)

CHAPTER OBJECTIVES

Readers will be able to

- outline 10 steps for implementing the portfolio process,
- describe the major phases for organizing and managing the portfolio process,
- set time lines and benchmarks in the portfolio process,
- use standards and performance assessment in portfolio evaluation and scoring, and
- explain potential pitfalls of the portfolio process and how to address them

SCENARIO

It was easy to hear the frustration in Marga's voice as she shared her reflections on the portfolio process during her final presentation session as a teaching credential candidate at Sunshine University. She began, "In the end, I could see that the portfolio was a good thing, but it bothered me that I really could not see it as a good thing until the very end of our program, and . . . then it was too late!" Marga continued, "We heard only a few comments about needing a portfolio at the beginning of the program, during the Introduction to Teaching course, and then again at the very end, when we were supposed to turn it in. Most of our professors said nothing about it or about which assignments would make good artifacts. Had I known then what I know now, it would have been so much easier to build my portfolio because I would have saved more items from the courses and the program. At first, I did not understand how the assignments were related to the standards. I knew about the K–12 subject matter standards we were supposed to be teaching our elementary and secondary students, but little was said about the teaching standards and how the courses were helping us to meet them. It did not come together for me until the student teaching seminar, when we were given a full outline of the teaching standards and the recommended portfolio table of contents. It all finally started to make sense. It would have been nice to hear about the portfolio from each of our professors, and how their assignments addressed the various standards. Now I can see that the courses did address the standards, but that was not always made clear to us."

Several other students chimed in and nodded heads in agreement. "I threw away so much stuff once the class was over and I got the grade," commented Julio, another student. "Now that I look at the standards, I realize that it wasn't always the final grade in the class but the process I went through that was most important. The portfolio helps you identify and articulate that process. It's really hard to go back and collect or re-create those pieces at the end! I think it would have helped if our professors had talked to each other about the process and if each had mentioned the portfolio as it related to each course and the overall credential program. That would be a big support for the students!"

"You took the words right out of my mouth," declared Larry, another student. "What helped me prepare my portfolio was my master teacher sharing her portfolio from her credential program with me. She shared that each of her professors had discussed and used a portfolio development process throughout the program. I believe that our professors also need to talk to each other and agree on the guidelines for what artifacts to include and how they will be evaluated."

Dr. Young, the instructor for the Student Teaching Seminar and the final portfolio presentation session, shared these comments from students with the credential program chair and the education dean later that afternoon. As a result of the comments from Dr. Young and other education faculty at Sunshine University who had had similar experiences, portfolio guidelines were added to each course, along with suggestions for which assignments to include and how those assignments addressed specific teaching standards. Dialogues also began among all faculty members in the credential program regarding new strategies they could incorporate to support the students throughout the portfolio process.

OVERVIEW

As the scenario demonstrates, the portfolio is not simply a collection of artifacts to be turned in at the completion of a program, but rather a dynamic process of planning, reflecting, collecting, and evaluating that occurs throughout the entire program and, ideally, extends throughout one's career. The purpose of this chapter is to lay out 10 steps or phases for making the portfolio process meaningful, rewarding, and informative.

We use the term *phase* to indicate that there is overlap between the various steps, and many of the phases can take place simultaneously. Figure 5.1 lists each of the 10 phases, which will be described in more detail throughout the chapter. We begin with a brief description of the major phases and describe how they can be used as steps to guide the portfolio journey. We then explore potential pitfalls in the portfolio process and ways to avoid them. We continue with recommendations for setting up time lines and benchmarks to help with time management. Next, evaluation and scoring are discussed and practiced. We conclude the chapter with strategies for promoting continual renewal and evaluation through the use of portfolios.

THE MAJOR PHASES OF PORTFOLIO ORGANIZATION

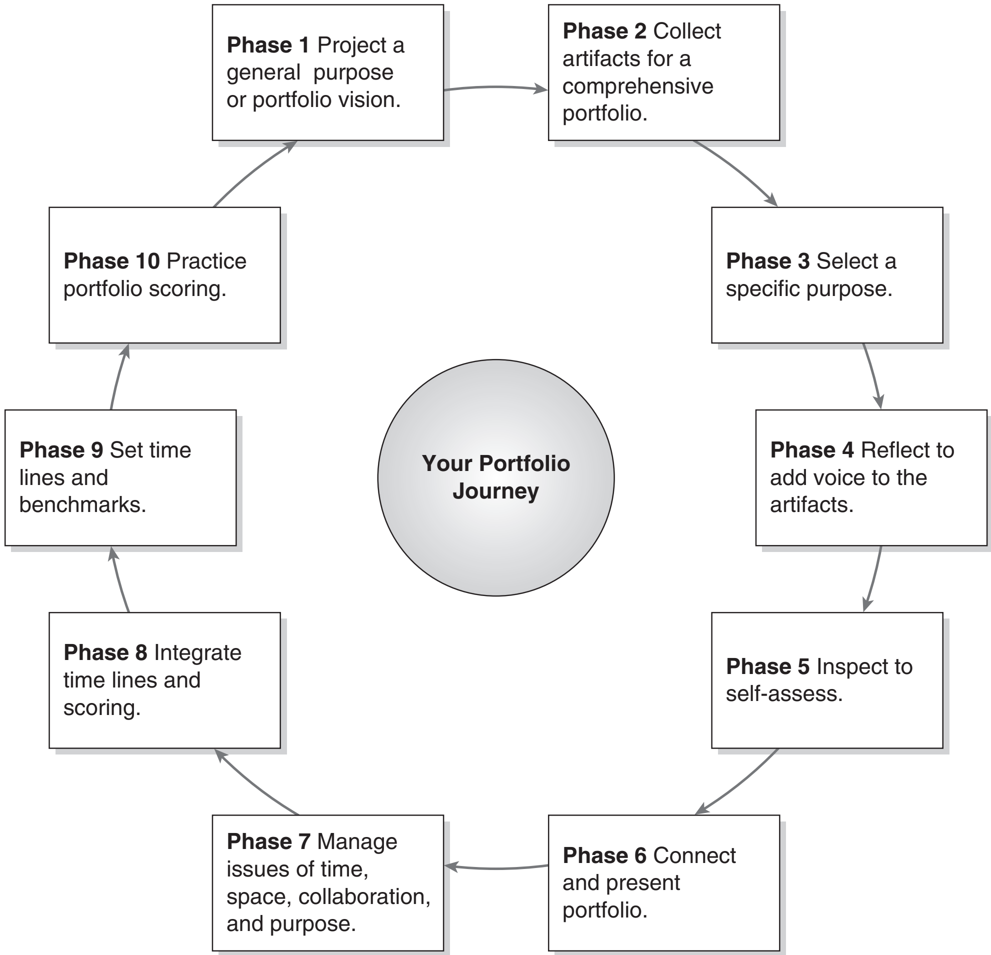
Barrett (2001) identified five major phases of portfolio development. These include (1) collection of a wide variety of artifacts, (2) projection of a purpose for the portfolio, (3) selection of artifacts for a specific portfolio purpose, (4) reflection on the value and role of each artifact, and (5) presentation of the portfolio. These phases are explained in Table 5.1, where each phase leads to a new cycle of refining and modifying the portfolio.

Table 5.1 is a modification of Barrett's (2001) original table, with the inclusion of *projection* as a beginning phase in the process and inspection for self-assessment as a fifth phase. This reinforces the vital roles of having a vision, setting goals, planning, reflection, and assessment throughout the portfolio process. It also emphasizes the cyclical nature of portfolio development, in that each phase supports and helps to define the next. It is important to begin the process with projection and to keep projection as a major step that one returns to throughout the portfolio process as new goals and purposes are identified.

Step 1: Project a purpose and have a vision for the portfolio: Begin with the end in mind.

Before even starting to collect artifacts, it is imperative to begin with the end in mind (Covey, 1990). Having a clear purpose or goal helps to clarify the process. For the first step, students must project a *general purpose* for their portfolios and describe how they envision the portfolio process will serve them, recognizing the multiple purposes that portfolios can serve, as stated in Chapter 1. Having a vision for the portfolio encourages students to explore a broad range of ideas for sharing their knowledge, skills, and attitudes or beliefs. It also places them in the active role of laying out goals and objectives and making plans on how to accomplish their goals. In essence, having a vision motivates students to take action.

FIGURE 5.1 Your Portfolio Journey at a Glance: Phases of Portfolio Development as a Cyclical Process



Phase 1: Project a general purpose or vision for the portfolio: Begin with the end in mind.
Phase 2: Collect artifacts: Build a comprehensive portfolio.
Phase 3: Select a specific purpose for the portfolio and establish learning targets for artifacts.
Phase 4: Reflect: Add reflections to the artifacts to communicate their specific purposes.
Phase 5: Inspect to self-assess: Assess the value of each artifact and project future goals.
Phase 6: Connect and present portfolio: Collaborate with others for feedback and goal setting.
Phase 7: Manage issues of time, space, collaboration, and purpose.
Phase 8: Integrate time lines and scoring into the portfolio process.
Phase 9: Set time lines and benchmarks at regular intervals.
Phase 10: Practice scoring the portfolio: Become familiar with rubrics and scoring criteria.

For the second and subsequent times going through the cycle, refine your portfolio selections based on new portfolio goals and purposes resulting from assessment and evaluation of your earlier goals. Continue to add to your comprehensive portfolio as an ongoing process.

TABLE 5.1 Phases of the Portfolio Development Process

Projection	Students write a vision that describes their future goals and intentions. Students decide on the purposes for the portfolio (e.g., formative assessment, summative evaluation, or marketing). The desired focus for the portfolio is set. Preliminary planning begins for addressing time, space, and human issues.
Collection (General, for comprehensive portfolio or personal archive)	Students save artifacts that represent a wide variety of accomplishments, achievement of specific learning targets, and growth opportunities. This leads to numerous possibilities and choices for portfolio development.
Selection	Students review and evaluate the artifacts they have saved, and they identify those that best demonstrate achievement of specific standards or learning targets. The selection criteria should reflect the learning objectives of the portfolio.
Reflection	Students explain their thinking about each piece in their portfolios, evaluating their own growth over time and their achievement of the standards. It is recommended to include reflections on each piece, plus an overall reflection on the entire portfolio.
Inspection for self-assessment and projection	Students compare their reflections with the standards and performance indicators and set future learning goals. This phase transforms portfolio development into professional development.
Connection and presentation	Students share portfolios with the appropriate audience, including their peers and supervisors, and collaborate on the contents, process, and purpose of portfolios. The feedback at this stage can lead to public commitments of professional development and future goal setting.

Source: Adapted from Barrett (2001).

LET'S PRACTICE!

Activity 5.1 Forging a Vision for Your Portfolio

Take a few moments to brainstorm the many ways a portfolio could serve you. Look back at Chapter 1 and consider the many purposes that portfolios serve. Answer the following questions:

- What types of portfolios could help you in telling your story now and in the future?
- In what ways will you use the portfolio?
- What benefits would you like to experience as a result of having a portfolio?

At this point, we are casting a broad net for looking at possibilities for multiple portfolios, rather than limiting the portfolio to only one objective. Write down your ideas. What is your vision for your portfolio?

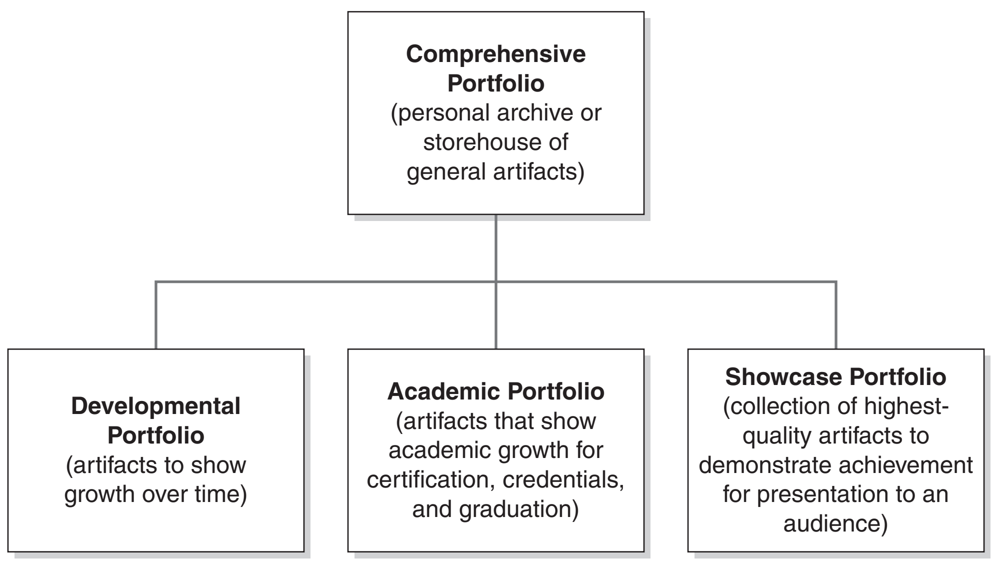
Step 2: Build a comprehensive portfolio or personal archive.

Closely aligned with setting a purpose, Step 2 involves building a comprehensive portfolio. The purpose of the comprehensive portfolio is to establish a personal archive for a variety of artifacts. The comprehensive portfolio is the initial building block for all subsequent portfolios. It is a reservoir of resources for presenting any number of stories to demonstrate your knowledge, skills, and beliefs. (We began this process in Chapter 2 with Activity 2.1, and an expanded description is in Chapter 10.) To facilitate this process, it is important to have a systematic way of organizing artifacts for easy access. Some general categories of artifacts include program documents, letters, candidate documents, field experiences, and assignments. (Additional ideas for organizing artifacts are presented in Chapter 6, and Table 6.11 presents some general categories for beginning to collect and organize artifacts for the comprehensive portfolio.) Such a system of preliminary organization will help in selecting artifacts for the later portfolios you develop. Figure 5.2 illustrates the role of the comprehensive portfolio in relation to the later categories of portfolios that can be developed, demonstrating how the comprehensive portfolio serves as the source for a variety of other portfolios, each with a specific purpose.

Step 3: Select a specific portfolio purpose with learning targets or standards and identify artifacts that match that purpose.

At this point, students select a specific purpose for their portfolios, and they become very selective in the artifacts they choose to fit that purpose. Since portfolios are used more and

FIGURE 5.2 Categories of Portfolio Development From General to Specific Purposes



more to make judgments or decisions (Hartnell-Young & Morriss, 2007; Mueller, 2008), it is important to clearly communicate the specific purpose at the very beginning of the portfolio as an introduction or executive summary. (Guidelines for writing portfolio introductions and executive summaries, along with samples, are included in Chapter 6 and on the CD.) For instance, if an achievement portfolio is desired for purposes of demonstrating completion of credential competencies, only artifacts would be selected that provide evidence of the credential standards or competencies. Likewise, if a showcase portfolio were desired for career advancement and job interviews, only artifacts would be selected that showcase the highest quality of performance aligned with the desired job requirements and qualifications. Students review and evaluate the artifacts they have saved and identify those that best demonstrate achievement of specific standards or learning targets. The selection criteria for artifacts should reflect the learning objectives of the specific portfolio. Remember, the same portfolio can be retooled to address a different purpose simply by changing the types of artifacts that are included and how these artifacts meet the learning targets.

For specific information related to this concept, see the Chapter 5 resources on the CD.

Step 4: Reflect on the value and role of each artifact and add reflections to communicate its purpose.

As emphasized in Chapter 4, reflections are the voice of the portfolio. Through reflections, students explain their thinking about each piece in their portfolio, evaluating their own growth over time and their achievement of the standards. According to Wolf and Dietz (1998) and Coghlan and Brannick (2004), reflections reveal episodes of learning and are essential companions to artifacts. Reflections go beyond simply describing the artifacts and their purpose, to examining the knowledge, skills, and attitudes of the portfolio designer, as well as his or her values and goals. We strongly recommend including reflections on each artifact or categories of artifacts, in addition to an overall reflection on the entire portfolio.

Step 5: Inspect artifacts to self-assess or ensure that they provide the strongest evidence of competencies and project future goals.

A natural follow-up to reflection is self-assessment, where one steps away from the portfolio process to analyze what is going well and why and what can still be improved upon in terms of artifacts and reflections (Montgomery & Wiley, 2008). Chapter 3 emphasized the importance of assessment and evaluation in the portfolio process. It also discussed using the portfolio as a tool to measure one's own growth and development. For Step 5, the artifacts are inspected to determine if they are serving the desired purpose in the portfolio. In this step, one conducts a self-assessment and modifies what is included in the portfolio to provide only the strongest evidence of the portfolio goals. One compares the reflections with the standards and performance indicators and sets future learning goals. This phase transforms portfolio development into professional development. Step 5 entails another level of projection or goal setting, where the earlier goals are reassessed and future goals are set. This phase of portfolio development fosters self-assessment skills through the cycle of inquiry into artifact selection and writing reflections on artifacts to document achievement of specific learning targets. It provides a mirror for viewing one's development in a variety of areas. Artifacts are also inspected to see that they provide a comprehensive and balanced profile of one's knowledge, skills, and attitudes. (In Chapter 6, we discuss more about the specific types of artifacts for each of the learning domains, including knowledge, skills, and dispositions or attitudes.)

Step 6: Connect with others to present the portfolio for assessment and evaluation.

For Step 6, students share portfolios with an appropriate audience, including their peers, instructors, and supervisors, and collaborate on the contents, process, and purpose of their portfolios. It is helpful to schedule several formative assessments of the portfolio while it is still in the developmental process, where students can receive feedback on how they may improve it. This goes back to Chapter 2, which described first-person, second-person, and third-person modes of action research that are designed for different audiences. To briefly review, in first-person mode, only the individual is the audience. In second-person mode, both the individual and a collaborative peer partner are involved. At the third-person mode, an entire community is involved. When portfolios are developed as a collaborative process, there may be many times for sharing the portfolio and receiving formative feedback and suggestions. This can be done in both the second-person and third-person modes. Many portfolio checkpoints can be set up along the way, where students become informed on the scoring and evaluation of the portfolio and are active participants in the process. When it is not collaborative, the portfolio may only be reviewed by instructors and supervisors, who also can provide vital feedback on what is going well in the portfolio development and how to improve it overall. The feedback at this stage can lead to public commitments of professional development and future goal setting. At other times, the portfolio may be shared only as a final product for informational or evaluation purposes. There are many scenarios for how and when a portfolio should be shared with different audiences (McNiff & Whitehead, 2006; Montgomery & Wiley, 2008; Mueller, 2008). These include opportunities to show growth, showcase excellence, celebrate a personal story, seek advice, document the steps in a long-term project, self-assess, plan new goals, and others. (More ideas are shared in Chapter 7 regarding ways to present the portfolio for different purposes and audiences and how to prepare for the **portfolio presentation**.)

Step 7: Manage issues of time, space, collaboration, and purpose.

One of the most challenging aspects for all participants involved in the portfolio process is managing the time and space it takes to develop a quality portfolio. Along with the previously mentioned steps, having a plan and a roadmap for the organization and management of time and space will make the journey easier. Forgette-Giroux and Simon (2000) suggest that the portfolio process involves four types of organizational issues, namely,

1. temporal or time issues,
2. spatial or issues of space,
3. human or collaborative issues, and
4. contextual or issues of purpose.

Temporal issues concern time spent on planning and scheduling portfolio assessment activities. *Spatial issues* deal with organizing the portfolio's format, design, and physical characteristics, including storage and access. *Human issues* include personal responsibilities, such as establishing and updating a table of contents, dating and sorting portfolio entries, writing reflections, and collaborating with others about the process. Last, *contextual aspects* have to do with specifying the purpose or objective of assessment and identifying the standards or appropriate learning targets.

Table 5.2 presents some questions to keep in mind at each phase of the portfolio process that address issues of time, space, collaboration, and purpose. These types of questions provide important guidance to students to maintain a comprehensive view of the portfolio and who needs to be involved; what should be done; and when, where, and how the process will take place.

Step 8: Address potential pitfalls by integrating time lines and scoring into the portfolio process.

Two potential pitfalls of the portfolio process are (1) time management, as previously mentioned, and (2) portfolio scoring. Both can be effectively addressed if they are integrated into the process as fundamental steps that are developed and communicated during the early planning stages. Portfolio time lines and scoring should also be revisited and modified at regular intervals throughout the process, based on feedback from instructors, supervisors, and students. The following section lays out specific recommendations for taking a proactive approach to time management and the scoring of portfolios. Table 5.3 presents additional portfolio management ideas. Table 5.4 introduces additional tips for keeping a portfolio.

Step 9: Set time lines and benchmarks at regular intervals.

Time management has been emphasized as one of the most critical elements in portfolio implementation (Barrett, 2001; Campbell et al., 2004; PATT, 2000). Establishing time lines with clearly defined **benchmarks** allows both students and instructors to schedule activities and pace themselves to complete the portfolio in a timely manner. The challenge is to identify relevant activities scheduled at appropriate intervals of time.

In specific programs, such as those leading to a teaching, administrative, or counseling credential, important times relevant to portfolio building come at the beginning, midway, and end of the program. There are also natural breaks, usually marked by semesters, quarters, or courses.

A sample time line is presented in Table 5.5, which identifies portfolio benchmarks that correspond to a candidate's time in a program. It has five suggested checkpoints that are appropriate for programs lasting a year or less. Note that these are only general indicators of the types of activities that facilitate pacing of the portfolio process. (Other sample time lines are available on the CD.)

For specific information related to this concept, see the Chapter 5 resources on the CD.

There should be a continual process for verification of completion of competencies throughout the program. This documentation will be critical for summative evaluations. Each candidate will need to keep a record of the certification of competencies. Programs should develop a template or checklist for students to use. It is also recommended that students continue to reflect on their portfolios even after the completion of their programs

TABLE 5.2 Questions for Each Phase of Portfolio Development

<table>
<tr><td>Projection</td><td>Contextual (Purpose)
What purposes do I want the portfolio to serve?
What competencies do I want or need to demonstrate, and what criteria will I use to assess them?
Temporal (Time)
What is a reasonable amount of time to allow for this process?
Spatial (Space)
What form is best for storage and retrieval of artifacts?
What strategies can be used for managing and organizing artifacts and reflections?
Human (Collaborative)
Who should be involved in the process, and how and when should they become involved?</td></tr>
<tr><td>Collection</td><td>Contextual
What artifacts represent achievement of specific standards and growth opportunities?
How do I reference each artifact (e.g., labels, reflections)?
Temporal
When do I begin to collect, and for how long should I collect?
Spatial
What form is best for storage and retrieval of artifacts?
Human
Who should be involved in the collection of artifacts?
Who can support in the collection of artifacts and in what ways?</td></tr>
<tr><td>Selection</td><td>Contextual
What artifacts best represent achievement of specific standards and growth opportunities?
Temporal
When do I begin to refine my selections, and for how long?
Spatial
What form is best for ranking and separating artifacts during storage and retrieval (e.g., manila folders, color coding, file cabinet, sticky notes, reflections)?
Human
Who should be involved in the selection and evaluation of artifacts?
Who can support in the selection and evaluation of artifacts and in what ways?
Who should be involved in establishing and reviewing criteria?</td></tr>
<tr><td>Reflection</td><td>Contextual
What types of reflections best articulate my thinking regarding each artifact and its role in evaluating growth over time and in achievement of the standards?</td></tr>
</table>

	Temporal • When is the best time to add reflections, and how do I schedule time for regularly adding and reviewing artifacts and reflections? *Spatial* • What form is best for storage and retrieval of reflections? • Where and how should I add reflections to the artifacts? *Human* • Who can provide support and give feedback on the artifacts and reflections? • What strategies can help with the storage and retrieval of reflections on a regular basis (e.g., sticky notes, index cards)?
Inspection for self-assessment and projection	*Contextual* • When artifacts and reflections are compared with standards and performance indicators, what future learning goals can be set? *Temporal* • Is the time line appropriate for reaching the desired benchmarks, or should adjustments be made in future planning? • Have appropriate time lines and benchmarks been set for the program, and what adjustments should be made, if any, in looking toward the future? *Spatial* • Are the storage and retrieval systems adequate for demonstrating growth over time and achievement when compared with the standards and performance indicators, or should modifications be made for future enhancement? *Human* • Who can support in comparing artifacts and reflections with the standards and for setting future learning goals? • When can and should this type of collaboration be scheduled?
Connection and presentation	*Contextual* • Is the overall purpose of the portfolio clear to my audience? *Temporal* • What is the best format for the presentation, given the time limitations? *Spatial* • What is the best format for the presentation, given the space limitations? *Human* • Who is the appropriate audience (e.g., peers, supervisors) for sharing the portfolio and collaborating on its contents, process, and purpose? • What is the best format for the portfolio presentation, given the specific purpose and the specific audience?

Source: Based on terms from Barrett (2001).

TABLE 5.3 Portfolio Management Ideas

1. Set up a time line with due dates for installments in the portfolio.
   - Practice writing reflective statements for each potential portfolio entry.
   - Make sample reflection sheets for dry runs.
2. Review samples of completed portfolios with emphasis on the importance of appearance in the scoring (e.g., organization, table of contents, use of graphics).
   - Notice the incorporation of technology, such as electronic portfolios (see Chapter 8).
3. To ensure clarity of expectations, review the rubrics or scoring guides in advance.
   - Practice self- and peer scoring of projects and the portfolio itself, including oral and written comments to each other.
4. Make the portfolio process convenient!
   - Use materials that are readily available, such as manila folders, sticky notes, and storage boxes.
   - Store folders, alphabetically, in milk crates, cardboard boxes, or file cabinets.
   - Use binders equipped with a space for video- or audiocassettes.
   - Color code to distinguish among classes, or use different file drawers.
   - Establish regular portfolio review sessions (both in and outside the classroom, if possible).

Source: Adapted from PATT (2000).

TABLE 5.4 Tips for Keeping a Portfolio

1. Always place a table of contents with dates and page numbers at or near the front.
2. Keep work for each unit or course in a folder, and then select a certain number of pieces at the end of the quarter or semester.
3. Photocopy or keep electronic files (or both) of group work so that members can include the work in their portfolios.
4. Include the instructor prompt where possible with each work entered.
5. Photograph or scan work that is too cumbersome to fit into the folder.
6. Tape (audio or video) explanations of oral presentations.
7. Keep computer disks or printouts of relevant material.
8. Include photographs of pre-K–12 students carrying out their work (e.g., an experiment or a group activity).
9. Maintain electronic portfolios and hard copies in different location.

Source: Adapted from PATT (2000).

TABLE 5.5 Sample Portfolio Checkpoint Time Line (for programs one year or less)

Time Line or Time Interval	Benchmark or Activity	Sign-Off Date
Opening of Program: Checkpoint 1	• Review portfolio and scoring guide. • Review portfolio terminology and view sample portfolios, if possible. • Review portfolio rubric and standards.	
Checkpoint 2	• Draft a goal statement for portfolio. • Practice writing reflections as part of some assignments. • Revisit program goals and standards and project goals for next time interval. • Write an end-of-interval reflection. • Participate in informal portfolio exchanges and discussions, including sharing reflective statements, among candidates, peers, mentors, and program instructors. • If possible, have instructors sign off on portfolio competencies.	
Midway: Checkpoint 3	• You are now halfway through the program! • You should have addressed at least half of the program goals and standards with samples of artifacts and reflections for each. • Reflect on initial program goals and set goals for remainder of program. • Refine goal statements and ensure that each artifact has reflections, captions, and so on. • Share portfolios with peers and mentors for formative feedback and further goal setting. • Revisit vision and philosophy; rework if necessary. • Check for instructors' sign-offs on competencies.	
Checkpoint 4	• Continue to complete assignments focused on the remainder of the program standards and goals. • Revisit the portfolio rubric and contents guide, noting any gaps or missing data. • Continue to update selections and reflections on portfolio entries. • Participate in informal portfolio exchanges and discussions, including reflective statements, among candidates, peers, mentors, and program instructors. • Begin to differentiate artifacts, and start an initial showcase portfolio from the working portfolio. • Select specific artifacts and reflections for the showcase portfolio, including examples of growth and development toward the workshop or course goals and standards. • Revisit vision and philosophy; rework if necessary.	
End: Checkpoint 5	• Present completed showcase portfolio to workshop or course instructors and peers as summative evaluation of candidate and workshop or course. • Present completed showcase portfolio as evidence of desired competencies for targeted areas.	

For specific information related to this concept, see the Chapter 5 resources on the CD.

(Continued)

TABLE 5.5 (Continued)

Time Line or Time Interval	Benchmark or Activity	Sign-Off Date
	• You have completed a successful portfolio process. • Check for instructors' sign-offs on competencies.	
Ongoing Checkpoint	• Continue to update selections and reflections on portfolio entries. • Share portfolio with peers and mentors for formative feedback and further goal setting beyond the program. • Conduct informal portfolio exchanges and discussions among peers, mentors, and program instructors. • Begin retooling the portfolio. Project new goals and applications for professional development and growth (see Chapter 10: After the Credential Program, Now What? Keeping the Portfolio Alive)	

Source: Adapted from PATT (2000).

and use the portfolios to guide future areas for professional development or employment opportunities. This is described as an ongoing checkpoint that continues after the completion of the program, course, or workshop. (This process will be addressed more in Chapter 10, which discusses keeping the portfolio alive.) Portfolios can also be developed within a particular course or workshop as a way of helping students organize and systematically collect artifacts that document growth and progress toward course or workshop goals and objectives.

In some cases, as in mini courses leading to certification in a particular skill or competency, such as designing programs for special populations (e.g., Inquiry Approaches to Science and Social Studies for English Language Learners, Building a Comprehensive Partnership With Parents and Community, or Steps to Opening Your Own Charter School), developing and maintaining a portfolio can be a valuable resource once the course has ended. The time line and benchmarks are parallel, regardless of the type of program, although there may be fewer checkpoints for mini courses. Or a mini course portfolio may simply include evidence of assignments and reflections from a particular course, with an overall reflection at the end of the course regarding its value in the student's professional development and the student's self-evaluation of course performance.

If there is no formal portfolio process in place for an entire program, course and workshop portfolios are a good way to expose students to the portfolio process. Similar benefits will accrue in terms of inquiry, reflection, organization, and time management.

For specific information related to this concept, see the Chapter 5 resources on the CD.

Table 5.6 provides sample checklists that can be used to document verification of introduction, development, and **mastery** of program competencies at various points of a teacher's preparation. Similar checkpoints are available on the CD for administrative and counseling credential programs. As portfolios are reviewed at certain checkpoints throughout the respective programs, reviewers might indicate when the portfolio was reviewed and the level of progress toward the standard or competencies emphasized in the program. Such a checklist can provide an overview of where and to what level specific competencies were addressed in individual courses. As we have mentioned, it is particularly helpful to have portfolio artifacts organized around specific standards. This is also true of assignments, such as writing lesson plans or developing organizational charts. More examples of aligning artifacts and assignments to standards are discussed in Chapters 6 to 8.

For specific information related to this concept, see the Chapter 5 resources on the CD.

TABLE 5.6 Sample Portfolio Checklist for Teaching Credential Candidates

INTASC Principle	Introduced: Course, Date	Developing: Course, Date	Mastery: Course, Date
Principle 1: Knowledge of Subject Matter	EDUC 300, 9/7/09	EDUC 302, 1/6/10	EDUC 400, 6/15/10
Principle 2: Knowledge of Human Development and Learning	EDUC 300	EDUC 301	EDUC 400
Principle 3: Adapting Instruction for Individual Needs	EDUC 300	EDUC 304	EDUC 403
Principle 4: Multiple Instructional Strategies	EDUC 300	EDUC 302	EDUC 402
Principle 5: Classroom Motivation and Management	EDUC 300	EDUC 301	EDUC 402
Principle 6: Communication Skills	EDUC 300	EDUC 315	EDUC 400
Principle 7: Instructional Planning Skills	EDUC 300	EDUC 302	EDUC 405
Principle 8: Assessment of Student Learning	EDUC 300	EDUC 301	EDUC 415
Principle 9: Professional Commitment and Responsibility	EDUC 300	EDUC 305	EDUC 418
Principle 10: Partnerships	EDUC 300	EDUC 305	EDUC 449

Step 10: Practice scoring the portfolio.

This final step in the portfolio journey addresses scoring the portfolio, as it is another potential pitfall in portfolio implementation. Students are encouraged to practice scoring their own and colleagues' portfolios to become more familiar with the criteria and levels of mastery on which they will be evaluated. To become more familiar with the scoring process, students should do mock scoring of assignments as part of their course activities.

These types of scoring activities are built into the portfolio time lines and checkpoints described in Tables 5.5. Scoring activities such as these further allow students to internalize the program standards and portfolio rubrics. They also allow for the portfolio scoring process to be broken down into predictable and manageable intervals.

Some of the concerns about scoring the portfolio involve the amount of time it takes to score, setting regular intervals for scoring, and establishing specific **scoring guidelines** and criteria to achieve agreement and consistency in assessing and evaluating the portfolio contents. In order for students to be more at ease with how portfolios are scored, it is important to get a clearer understanding of the common strategies that are used. Chapter 3 discussed the value of portfolios for both formative and summative evaluation and listed recommendations for helping portfolios become more reliable when used for certification purposes. Many of these recommendations centered around scoring.

Some other considerations for improving the portfolio-scoring process, suggested by PATT (2000), include the use of holistic scoring, which addresses the time issue, and collaborative scoring, which addresses setting criteria and fostering agreement and consistency in scoring, as part of portfolio professional development. Interval scoring is a third technique to break down the scoring process into manageable chunks and takes place at regular intervals or checkpoints throughout the portfolio process. Please see suggested checkpoints in Table 5.5.

Holistic scoring, according to PATT (2000), is getting a general impression of the entire portfolio. It is not a detailed review nor is it a checklist process or item-by-item search. Rather, an anchor assignment or examples of past portfolios, which have had each criterion or standard scored previously, are used for this scoring system. Because the portfolio is designed to be scored, it may become part of the program's or college's overall assessment and accountability system. Many universities are moving in this direction as commercial electronic portfolio programs, such as *TaskStream* and *FolioLive,* offer strong management tools to assist in scoring and documentation.

GENERAL PORTFOLIO SCORING PROCEDURE

One strategy recommended by PATT (2000) is a general portfolio scoring procedure designed to provide a simple feel for the portfolio and to minimize the time it takes to score. It involves three main steps:

1. *Start with a brief scan of the entire portfolio to get a general sense of its contents, organization, and purpose.* There is no detailed reading by the scorer at this point, only general impressions.
2. *Read the portfolio executive summary and review the artifact selected by the candidate as the best evidence of the standard or learning target under consideration.* Compare the item to the rubric or anchor piece to decide on a score. This should be done quickly to get a general view of the student's level of proficiency.
3. *Skim the remainder of the portfolio for further evidence beyond the initial score.* The scorer reviews other artifacts to support the standard and guide the scorer

in determining the actual level of proficiency if it seems to fluctuate between a higher or lower score.

Activity 5.2 allows you to practice portfolio scoring.

LET'S PRACTICE!

Activity 5.2 Exploring Sample Rubrics and Sample Scoring of Portfolios

The following activities will assist you in practicing the scoring of portfolios:

- Take some time to explore sample portfolios along with the rubrics or scoring criteria used to evaluate them. If possible, seek a variety of portfolio samples, each demonstrating a different level of proficiency, to allow you to review both strong and weak samples of evidence. Practice scoring each portfolio without looking at how it was evaluated. Did you agree with the scorer of the portfolio? Was there consistency in your scores compared to those of the evaluator? If there were differences, where did these occur?
- Collect as many program rubrics and scoring criteria from your current program as possible. Place them in your comprehensive portfolio for easy reference.
- As you and your peers complete various parts of your portfolios, do a portfolio exchange where you do mock scoring of a certain criterion in each others' portfolios. Use the program rubrics to evaluate each specified learning target. Use the holistic scoring technique as a strategy for scoring. Write out your evaluations of each others' portfolios and discuss the results with each other.
- Write down any questions or concerns you have about portfolio scoring and evaluation and share them in class.

The holistic scoring procedure is based on a process of estimating the proper score on the rubric. As an example, in the three-point portfolio rubric sample provided in Table 5.7 for teacher credential candidates, the line between *Credit* and *No Credit* is essentially the dividing line between proficient work and work that is not proficient. (Similar three-point sample portfolio rubrics for administrative credential candidates and counseling credential candidates are available on the CD). After looking at the primary evidence for the standard or criteria, the scorer should form an impression of whether or not the candidate demonstrates proficiency. This means that the scorer will always start on the Credit–No Credit line and determine if the candidate scores on the proficient or the not-proficient side. Once the scorer establishes proficiency, the rest of the artifacts in the portfolio are considered, to decide which of the two levels of proficiency is appropriate. For instance, if the scorer decides initially that the work seems proficient in the parameter for Content Knowledge in Planning and Instruction, he or she would then decide only between levels Credit and Exceeds Standard. If the work is not proficient, then the decision would be No Credit. This appears to be an easier approach for some people to use.

For specific information related to this concept, see the Chapter 5 resources on the CD.

TABLE 5.7 Sample Rubric for Teaching Credential Candidates

Directed Teaching, Demonstration of Competencies Evaluation Rubric		
INTASC Principle 1 Knowledge of Subject Matter		
No Credit	**Credit**	**Exceeds Standard**
Candidate provides little or no evidence of subject matter mastery, understanding of available classroom materials, and capacity to integrate appropriate subject matter into lesson plans.	Candidate provides sufficient evidence of subject matter mastery, understanding of available classroom materials, and capacity to integrate appropriate subject matter into lesson plans.	Candidate provides consistent and ample evidence of subject matter mastery, ability to adapt and augment available classroom materials to meet student needs, and capacity to integrate appropriate subject matter into lesson plans, based on student progress and interests.
INTASC Principle 5 Classroom Motivation and Management		
No Credit	**Credit**	**Exceeds Standard**
Candidate is unable to use instructional time effectively or efficiently. Candidate provides little or no evidence of the ability to develop and maintain expectations of appropriate student behavior. Candidate does not develop a productive learning climate or consider alternative classroom management routines to build one.	Candidate uses instructional time effectively and efficiently. Candidate provides evidence of the ability to create and maintain an environment for effective student learning along with expectations of appropriate student behavior. When classroom problems arise, candidate seeks solutions through alternative classroom management routines.	Candidate provides clear, consistent, and convincing evidence for the effective and efficient use of instructional time. Candidate consistently provides evidence of the ability to create and maintain an effective environment for student learning along with clear and consistent expectations of appropriate student behavior. When classrooms problems arise, candidate anticipates solutions by implementing alternative classroom management routines.

INTASC Principle 7 Instructional Planning

No Credit	Credit	Exceeds Standard
Candidate provides little or no evidence of planning for instruction. Plans do not reveal knowledge of state standards; integrate appropriate content; describe and align goals, materials, strategies, or assessment methods; use whole class and small groups; and connect to prior and future instruction.	Candidate provides sufficient evidence in planning for short- and long-range instruction. Plans show knowledge of state standards; describe and align goals, materials, strategies, and assessment methods; integrate appropriate content; use whole class and small groups; integrate available instructional technology; connect to prior and future instruction; and connect with students' lives, interests, and instructional needs.	Candidate provides consistent and ample evidence in planning for short- and long-range instruction. Plans show knowledge of state standards; describe and align goals, varied materials, strategies, and multiple assessment methods; integrate appropriate content; use whole class and small groups; employ effective technology; and clearly connect to prior and future instruction, students' cultures and interests, instructional needs, and other disciplines.

Source: Adapted from California State University (2004).

Other scoring rubrics for portfolio presentations and portfolio documents are found in Chapter 7 and on the CD.

For specific information related to this concept, see the Chapter 5 resources on the CD.

SUMMARY

We have provided 10 valuable steps for managing the portfolio journey in this chapter. Portfolios can be organized, goal-driven, living documents when implemented with careful planning and collaboration. Portfolios are also a valuable resource for providing concrete evidence of the knowledge, skills, and attitudes that have been mastered by the students. Through carefully following the 10 steps of the portfolio journey, a continual process is established for evaluating both students and programs. Inherent in portfolio development are projection, planning, reflection, inquiry, assessment, and collaboration.

Also, when the management of the portfolio becomes integrated into the portfolio process—for example, by establishing time lines and benchmarks or sharing strategies for scoring the portfolio—many of the common pitfalls can be avoided. In this way, the portfolio journey is easily approached and more consistently implemented. These 10 steps help in making portfolio development a transparent process whose value is understood by both students and instructors.

USEFUL RESOURCES

The following resources will be useful in developing your portfolio implementation plan.

INTASC (Interstate New Teacher Assessment and Support Consortium; http://www.ccsso.org/Projects/Interstate_New_Teacher_Assessment_and_Support_Consortium/)

The Web site a consortium of more than 30 states operating under the Council of Chief State School Officers (CCSSO), which has developed standards and an assessment process for initial teacher certification (Campbell et al., 2000).

Portfolio Development (http://www.sitesupport.org/module1/portfproc.htm)

Online professional development from Johns Hopkins and Morgan State Universities on the portfolio development process.

Portfolio Implementation Guide. (http://www.pde.state.pa.us/fam_consumer/lib/fam_consumer/20/23/portig.pdf)

Pennsylvania Assessment Through Themes. (2000). Portfolio implementation guide. Retrieved August 25, 2005.

Practical Assessment, Research and Evaluation (http://PAREonline.net/ getvn.asp?v=7&n=4)

A peer-reviewed electronic journal.

Rubrics for Web Lessons (http://edweb.sdsu.edu/webquest/rubrics/weblessons.htm)

A site featuring a guide to creating rubrics and authentic assessments.

Student Reflection Samples (http://www.sitesupport.org/module1/INTASC_PRINCIPLE_1_1.htm)

A site featuring samples of student reflections based on INTASC Principles:

FOR FURTHER READING

Dietz, Mary E. (2008). *Designing the school leader's portfolio (*2nd ed*.).* Thousand Oaks, CA: Sage.

Hartnell-Young, E., & Morriss, M. (2007). *Digital portfolios: Powerful tools for promoting professional growth and reflection.* Thousand Oaks, CA: Corwin Press.

Hebert, E. A. (2001). *The power of portfolios: What children can teach us about learning and assessment.* San Francisco: Jossey-Bass.

Montgomery, K., & Wiley, D. (2008). *Building e-portfolios using PowerPoint: A guide for educators* (2nd ed*.).* Thousand Oaks, CA: Sage.

Rieman, P. (2000). *Teaching portfolios: Presenting your professional best.* Boston: McGraw-Hill.

Taggart, G. L., & Wilson, A. P. (2005). *Promoting reflective thinking in teachers: 50 action research strategies* (2nd ed.). Thousand Oaks, CA: Sage.