

**SCHOOL OF EDUCATION  
FACULTY OF HUMANITIES AND EDUCATION  
THE UNIVERSITY OF THE WEST INDIES  
ST. AUGUSTINE**

**A Portfolio Training Manual**

**Using the Portfolio as a Model for Training**

**Margaret Cain  
Anna-May Edwards-Henry  
Joycelyn Rampersad**

The ideas and opinions expressed in this work are those of the authors and do not necessarily represent the views of the School of Education.

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## **ACKNOWLEDGEMENTS**

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## ABOUT THE AUTHORS

**Margaret Cain** is a Science Lecturer at Corinth Teachers' College, Trinidad and Tobago, and is currently pursuing a Ph.D. in teacher education at the School of Education, The University of the West Indies (UWI), St. Augustine. Margaret has an interest in using portfolios as a teaching, learning, and assessment strategy, which commenced with the production of her own professional portfolio as part of a postgraduate programme offered at the School of Education, UWI in 1994. She also successfully undertook a study of the portfolio as an innovative instructional strategy for the research component of her master's degree.

**Anna-May Edwards-Henry** is Director of the College of Health Sciences, National Institute of Higher Education, Research, Science and Technology (NIHERST), Trinidad and Tobago. She is currently completing a Ph.D. in education at the School of Education, UWI. Anna-May uses the portfolio as a teaching, learning, and assessment strategy in various professional courses that she conducts. Her particular skill is the use of captions to facilitate the reflective process. Two courses in which she uses the portfolio are: RAD 350 - Principles of Curriculum Development & Methods of Teaching, in the Radiological Sciences Associate Degree programme offered at NIHERST; and ED 50C - Principles and Practice of Teaching, in the Nursing Education Certificate programme offered at the School of Education, UWI.

**Joycelyn Rampersad** is a Temporary Lecturer at the School of Education, UWI, St. Augustine, and is currently pursuing a Ph.D. in education at the School of Education. Joycelyn uses the portfolio as a teaching, learning, and assessment strategy in two programmes in which she teaches - the Post-Graduate Diploma in Education and the Certificate in Education programmes, which prepare teachers for professional certification. One area of research interest is the nature of in-service science teachers' reflections. This has motivated her to develop expertise in portfolio development, as the portfolio is the vehicle through which her student teachers reflect on, and document, their growth as reflective practitioners.

## Overview

### The Workshop

This portfolio came about as a result of a workshop conducted by Margaret, Anna-May, and Joycelyn for members of the local chapter of the Association for Supervision and Curriculum Development (ASCD). The workshop was held in December 2000 for approximately 45 members of the teaching fraternity who function at various levels in the education system of Trinidad and Tobago.

The purpose of the workshop was to introduce participants to techniques in portfolio development and assessment.

The strategy used to facilitate this purpose was to present a mix of plenary presentation sessions and group interactive sessions. These sessions covered an introduction to concepts in the use of the portfolio as a teaching and assessment strategy, as well as in the practice of developing 'item sets.' The item sets represented pieces of work which can be created specifically for the portfolio, and included an identified purpose, a simulated piece of student's (portfolio developer's) work, an appropriate caption, and the means of scoring the item.

The concept of the portfolio represented in the focus and strategy of the workshop supports the following definition of a portfolio:

A cumulative and on-going collection of entries that are selected following a given framework and reflected upon by the student, to assess his or her development of a specific but complex competency. (Simon & Forgette-Giroux, 2000, p. 87)

### The Portfolio Training Manual

This portfolio training manual attempts to capture the *ways of knowing a discipline* that *teachers possess* as well as *knowing a discipline in the ways of practitioners* (Kerka, 1997). That is, teachers know a discipline in a way in which it can be taught. This is distinct from the way in which practitioners know a discipline. Practitioners know or master their discipline in the practice or performance of it. For example, scientists know science through the practice of it, while science teachers know the subject matter that they break up into teachable fragments, through which they guide learners to construct their knowledge and practice of the discipline. This distinction between the teacher and the practitioner can be seen in any discipline such as mathematics or language, or sub-discipline such as assessment or teaching strategies.

We hope to avoid falling into the Shawan (as in George Bernard Shaw) trap--those who can't, teach--which conducting the workshop might unwittingly support. Therefore, we show that we can actually develop a good portfolio. Thus, this portfolio manual marries the concepts of breaking up the strategy into teachable fragments such as the items sets used to teach how items might be constructed for a portfolio, and it also demonstrates practitioners' knowledge of the strategy through the actual development of this portfolio.

### **Manual Presentation Format**

The manual is structured on a framework of samples of materials produced for, or at, each stage of planning for and implementing a portfolio workshop. These samples of material are presented in a manner that illustrates essential portfolio characteristics such as a stated purpose, reflections, and captions. Much emphasis is laid on the captions that can be used to teach portfolio developers reflective skills, as well as to facilitate reflection on the items selected for the portfolio.

Although the main focus of the manual is on the essential features of the portfolio, teaching notes and suggestions for activities are included.

An unusual characteristic of this particular portfolio is that it was developed by a *team*. However, we were careful to retain the portfolio characteristics of uniqueness and creativity that sometimes manifested themselves as individual musings and reflections, and sometimes as collective perspectives. Therefore, we have taken the portfolio strategy to another realm and, to us, this emphasises a major strength of the portfolio--its development is only limited by the limits of the imagination of the developer.

## ***How We Got Here!***

*(How we found ourselves constructing a portfolio development training manual)*

*There were two major ideas that guided us to adopt this strategy of constructing a portfolio after our workshop experience. The first was that we felt we did not want to lose the valuable products of the workshop and we wanted a good vehicle for their display. Secondly, we felt that workshops could be much more useful. They need not be isolated and one-shot affairs which, though valuable in generally piquing interest of participants, often fall short of bringing about real changes. Thus, we felt the need to produce documentation of significance out of this workshop. We wanted to go beyond the mere evaluation feedback forms and the dry reports of some of the better-conducted workshops with which we were familiar.*

*We believe that workshops provide excellent opportunities for growth since knowledge and skills can be respectively accumulated and developed and improved upon with successive training opportunities. There should be significant products emanating from individual workshops to guide future workshops, to provide continuity between series workshops, as well as to provide a trail of knowledge and events for newcomers.*

*Further, most participants leave workshops with a thirst that is never satisfied because there are often no efforts to build on previous skill and knowledge gains.*

*As regards significant products of workshops, almost as much time needs to be spent reflecting on an implemented workshop to improve conduct of future ones and to address issues raised, if meaningful work is to be done through this strategy. We felt that using the workshop theme to develop a portfolio might not only be a creative way of attempting a workshop report, but it could actually provide a means of demonstrating the very things we were teaching.*

*Of course, as is usual with 'good' ideas . . . they grow . . . so that soon, as we reflected more and more on how we should do this report (which was grounded in our collaborative thinking, to which was added healthy doses of creative imaginings and full-voiced discussions) our report idea blossomed from a mere showcase portfolio to a training manual, which we now present.*

### **Teaching notes and/or activity**

This is an example of a reflective item. A major portfolio feature is the reflective component. **Reflection** is at the root of cognition and learning and the challenge of teaching is to facilitate and encourage development of this characteristic in learners. (Dewey, 1966; Schon, 1987)



# **SECTION 1**

## **PORTFOLIO PURPOSE**



## **PORTFOLIO PURPOSE**

There are several purposes for the development of this portfolio:

- To show how the portfolio can be used to facilitate understanding of techniques involved in portfolio development and assessment.
- To demonstrate our expertise in portfolio development and the creativity we can collectively bring to facilitating learning through the strategy (portfolio development).
- To demonstrate how we have grown as a team of facilitators for introducing others to the portfolio as a teaching/learning and assessment strategy.

### *Caption for Portfolio Purpose*

*The purpose of our portfolio may sound pedantic--cut and dried--but we so wanted to get the message across that a portfolio develops out of a purpose that we closely followed the rules in composing it. We feel that this immediately strikes at the heart of a major characteristic of portfolio development and that is--there must be a clearly stated purpose for developing the portfolio.*

#### **Teaching notes and/or activity**

The **caption** is a major characteristic of the portfolio. It serves as a means of facilitating reflection thus fostering the higher levels of cognition that the portfolio encourages. A portfolio developer could be as creative as he or she desires in writing captions.

Caption writing could be used to teach portfolio developers how to engage in reflection. They may be asked some of the following types of questions in this regard:

- Why do you like this piece of work? or What does this piece of work mean to you?
- How would you grade it? or Give the piece of work one of the following grades – A, if you consider it good; B, if you consider it to be a fair piece of work; C if you feel that it needs a lot more work.
- If you had the chance, how would you improve it?
- Why did you choose this piece of work for your portfolio?

## **SECTION 2**

# **PLANNING FOR PORTFOLIO DEVELOPMENT IN A WORKSHOP SETTING**



## SECTION CONTENTS

- Introduction
- Caption for Workshop Planning
- Draft Programme - Outline 1
- Merging of the Minds [Caption on Planning Process]
- Programme Rationale - Draft 2
- Final Programme - Outline 3
- Caption on Planning Process
- Workshop Activity Guidelines
- Workshop Evaluation Form
- Examples of Portfolio Items in the Process of Development



## Introduction

Planning for the workshop took place during two meetings and through the use of e-mail. Once we had agreed that we would participate in the exercise, we arranged an appropriate time to meet to discuss our ideas. Because of the range of experiences we brought to the table, we were able to immediately commence work on the development of the workshop rationale, objectives and activities for the workshop, and an outline for its implementation. Subsequent contact was primarily for refining our original ideas.

The following is a list of the topics/materials developed for the workshop implementation:

- Development of Workshop Rationale, Objectives, and Activities
- Outline of Facilitators' Programme
- Outline of Participants' Programme
- Workshop Activity Guidelines
- Workshop Evaluation
- Samples of Portfolio Items in Development

### **Teaching notes and/or activity**

Develop a *simple* plan for implementing a workshop on the use of an identified alternative assessment strategy, for example, a journal or a group project. Include in your plan a rationale, objective, and outline of the activities in which you wish participants to engage.



### ***Caption for Workshop Planning***

*Planning the workshop was a very interesting experience for us. Margaret and I (Anna-May) work together constantly. We have planned several events together even if only one of us is participating. We made plans for, and reflected on, the implementation of several workshops on alternative assessment strategies in which Margaret featured as a presenter. So Margaret has actual experiences in conducting such workshops, while I consider my experiences in this regard, vicarious. But I do have experience in implementing portfolios as a teaching, learning and assessment strategy.*

*But I think that we are so comfortable with each other in exploring how we might make workshops of this nature effective, and we have done it so many times that we found ourselves using terminology we ourselves coined, for example, 'item sets,' and we were not always completely expressing our thoughts, so that we ran the risk of losing Joycelyn along the way in our planning sessions. I recall that she did have to stop us a few times to demand an explanation.*



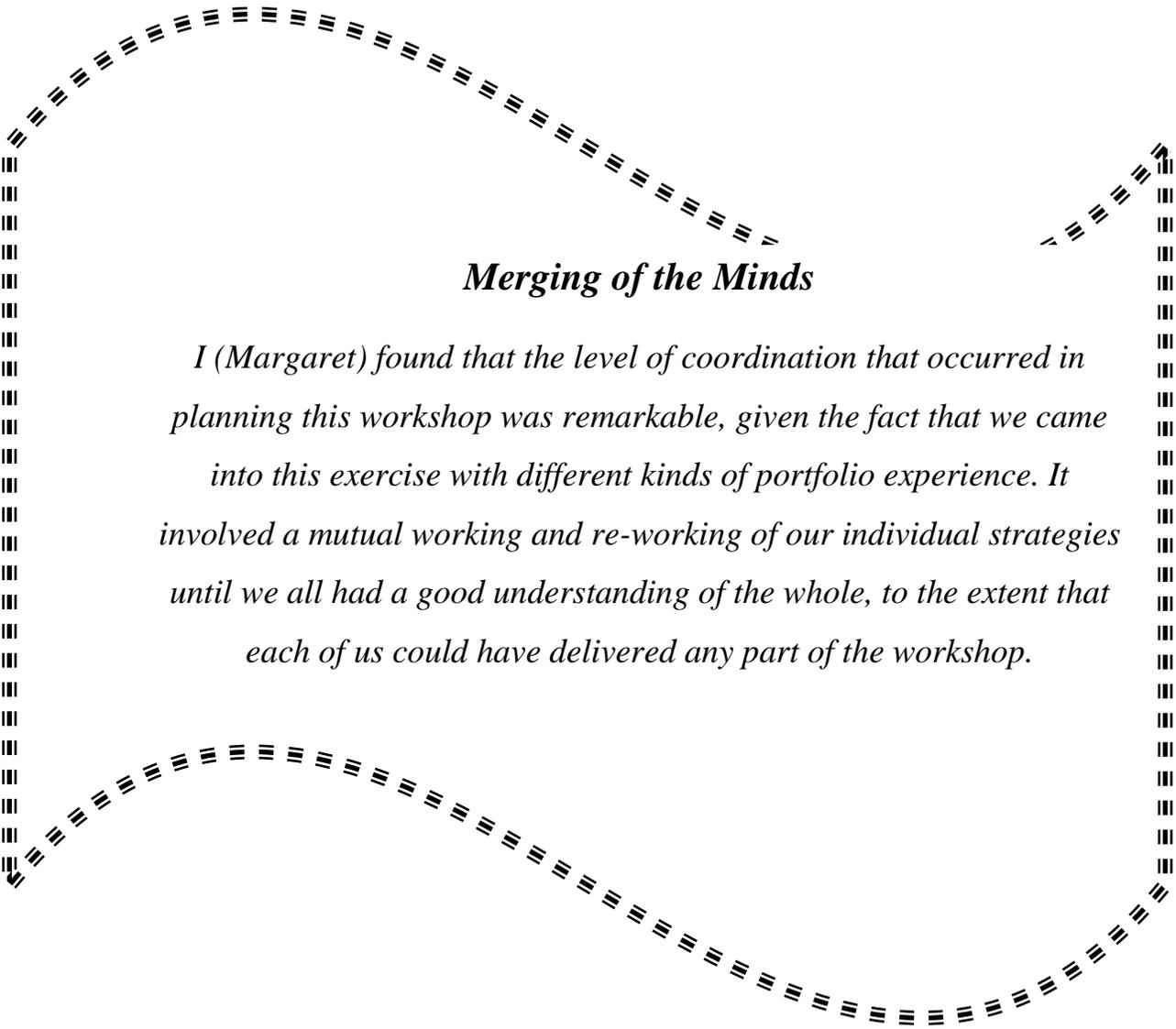
*When I (Joycelyn) was asked to conduct a workshop on portfolio development and assessment, my immediate response was that as a novice in this area, I could do it only as part of a team of facilitators that could bring different kinds of expertise to the meeting table. Of course, I had in mind who these persons should be – Margaret, I knew had had actual experience in conducting portfolio workshops, and Anna-May had considerable knowledge about assessment and portfolio implementation. My experience included theoretical knowledge gained from the extensive literature on portfolios as well as my own involvement in portfolio assessment.*

*Margaret and Anna-May literally jumped on board, and the brainstorming session to plan the format for the workshop was a real eye-opener for me. I discovered that from working together and sharing a long friendship, they have developed a form of communication (body language, ‘coined terms,’ and a light bantering, etc.) that threatened to exclude me at times. I had to engage in some ‘mental running’ to keep up with the flow. The pre-planning exercises were very rewarding for me, and we were able to draw on Margaret’s practical experience to come up with a format that we felt could meet our objectives within the time frame that was available.*

## Draft Programme - Outline 1

### TRINIDAD AND TOBAGO ASSOCIATION FOR SUPERVISION AND CURRICULUM DEVELOPMENT (TTASCD) PORTFOLIO WORKSHOP

- Date: Saturday December 2<sup>nd</sup>, 2000  
Venue: Valsayn Teachers' College  
Time: 9:00 a.m. - 3:00 p.m.  
Target Audience: Primary and Secondary School Teachers of Trinidad and Tobago
- Rationale: The current trend in education is towards more student-centred practices. These practices require students to actively participate in their educational development, in which they must demonstrate a range of achievements that traditional forms of assessment, primarily pencil and paper tests, are no longer adequate to assess. We need assessment strategies that will capture a wider array of what students know and can do, provide continuous feedback on student performance, and integrate assessment with instruction in a way consistent with current theories of instruction. The student portfolio is one such alternative.
- Objectives: Participants should be able to:
- identify the characteristics of a portfolio
  - design item sets for a portfolio, including sample items and scoring rubrics
  - reflect on the value of the portfolio as an instructional and assessment tool
- Programme:
- Welcome/Introduction 9:00 a.m. - 9:10 a.m.
- PLENARY 9:15 a.m.- 10:30 a.m.
- Overview – Trends in alternative assessment; situating the portfolio within the alternative assessment paradigm; strength of the portfolio as an instructional and assessment strategy (9:15 a.m. - 9:45 a.m.)
  - A practical approach to portfolio development - Purpose and structure of the portfolio; techniques in portfolio development (10:00 a.m. - 10:30 a.m.)
- INTERACTIVE SESSION 10:30 a.m. - 12:00 noon
- Developing portfolio items
  - Review and critique of portfolio items/portfolios
- LUNCH*
- PLENARY 1:00 p.m. - 1:40 p.m.
- Portfolio assessment – Task analysis  
Criteria definition  
Rubric development  
Scoring
- INTERACTIVE SESSION 1:40 p.m. - 2:10 p.m.
- Developing rubrics to complete item set
  - Reflections on the portfolio as an instructional and assessment strategy
- PLENARY 2:10 p.m. - 3:00 p.m.
- Group presentations of item sets (2:10 - 2:25)
  - Closure (2:25 - 2:40)
  - Evaluation
- Facilitators: Joycelyn Rampersad (co-ordinator), Lecturer, School of Education, UWI  
Anna May Edwards-Henry, Director, College of Health Sciences, NIHERST  
Margaret Cain, Lecturer, Corinth Teachers' College



### *Merging of the Minds*

*I (Margaret) found that the level of coordination that occurred in planning this workshop was remarkable, given the fact that we came into this exercise with different kinds of portfolio experience. It involved a mutual working and re-working of our individual strategies until we all had a good understanding of the whole, to the extent that each of us could have delivered any part of the workshop.*

#### **Teaching notes and/or activity**

This caption highlights the use of metaphors – 'merging of the minds.' Using metaphors is a characteristic of work in the *qualitative* paradigm, which is best illustrated in such alternative teaching and assessment strategies as the portfolio.

## Programme Rationale – Draft 2

### **TRINIDAD AND TOBAGO ASSOCIATION FOR SUPERVISION AND CURRICULUM DEVELOPMENT (TTASCD) PORTFOLIO WORKSHOP**

Tentative Date: Saturday December 2<sup>nd</sup>, 2000  
Venue: Valsayn Teachers College  
Time: 9:00 a.m. - 3:00 p.m.

Target Audience: Primary and Secondary School Teachers of Trinidad and Tobago

Rationale: The current trend in education is toward more student-centred practices that require students to actively participate in their educational development. Students must demonstrate a range of competencies that traditional forms of assessment, primarily pencil and paper tests, cannot adequately assess. We need assessment strategies that will capture a wider array of what students know and can do, provide continuous feedback on student performance, and integrate assessment with instruction in a way consistent with current theories of instruction. The student portfolio provides one avenue to attain these objectives.

Objectives: Participants should be able to:

- identify the characteristics of a portfolio
- design item sets for a portfolio
- generate rubrics for scoring items in a portfolio
- reflect on the value of the portfolio as an assessment tool

## Final Programme – Outline 3

### **TRINIDAD AND TOBAGO ASSOCIATION FOR SUPERVISION AND CURRICULUM DEVELOPMENT (TTASCD) PORTFOLIO WORKSHOP**

Date: Saturday December 2<sup>nd</sup>, 2000  
Venue: Valsayn Teachers' College  
Time: 9:00 a.m. - 3:00 p.m.

Target Audience: Primary and Secondary School Teachers of Trinidad and Tobago

Objectives: Participants should be able to:

- identify the characteristics of a portfolio
- design item sets for a portfolio including sample items and scoring rubrics
- reflect on the value of the portfolio as an instructional and assessment tool

Programme: **WELCOME/INTRODUCTION**

#### ***PLENARY***

- Overview – Trends in alternative assessment; situating the portfolio within the alternative assessment paradigm; strength of the portfolio as an instructional and assessment strategy
- A practical approach to portfolio development - Purpose and structure of the portfolio; techniques in portfolio development

#### ***INTERACTIVE SESSION***

- Developing portfolio items
- Review and critique of exhibits of portfolio items/portfolios

**LUNCH** (12:00 noon – 1.00 p.m.)

#### ***PLENARY***

- Portfolio assessment – Task analysis; criteria definition; rubric development; scoring

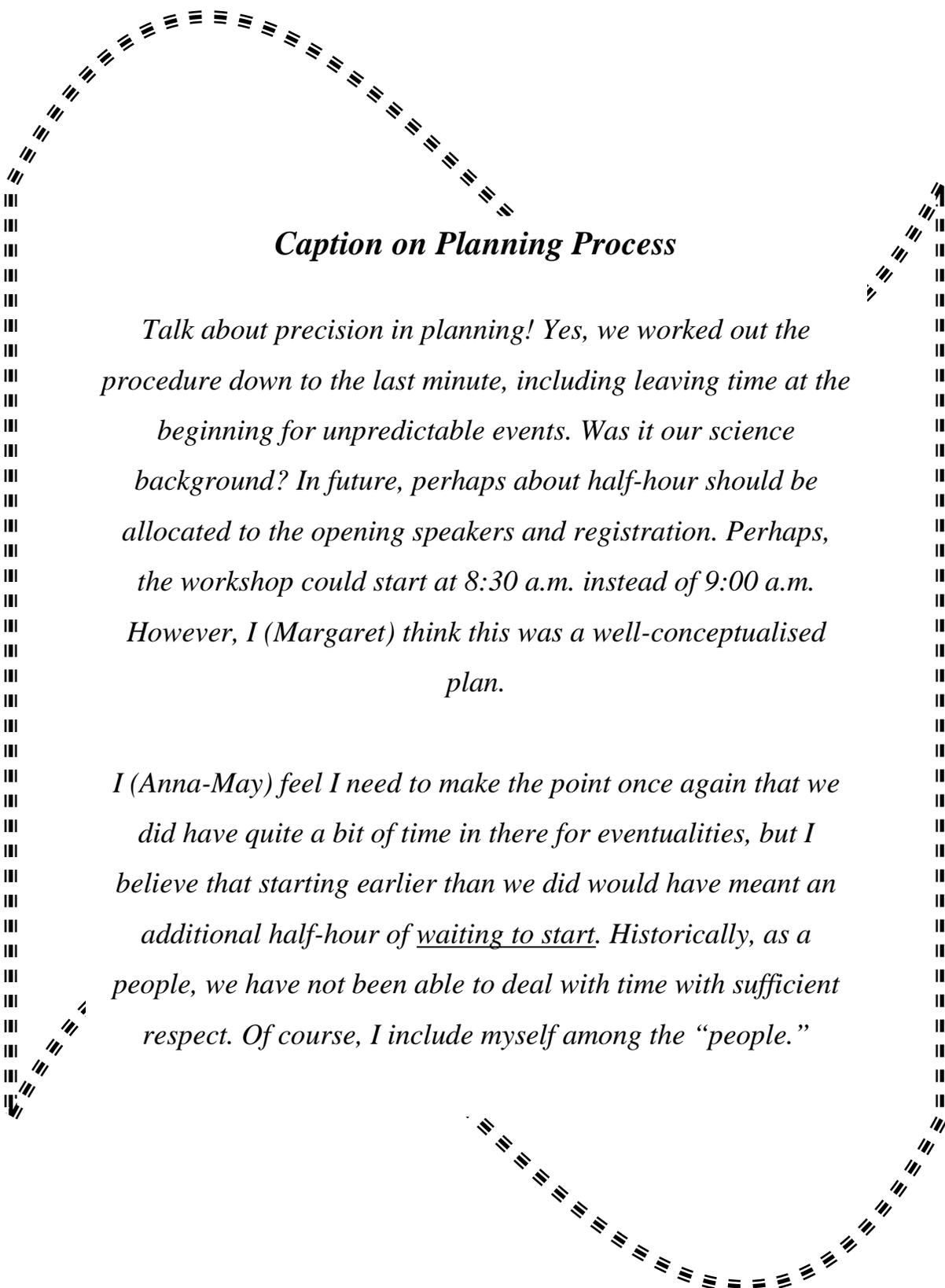
#### ***INTERACTIVE SESSION***

- Developing rubrics to complete item set
- Reflections on the portfolio as an instructional and assessment strategy

#### ***PLENARY***

- Group presentations of item sets
- Closure
- Evaluation

Facilitators: Joycelyn Rampersad (co-ordinator), Lecturer, School of Education, UWI  
Anna-May Edwards-Henry, Director, College of Health Sciences, NIHERST  
Margaret Cain, Lecturer, Corinth Teachers' College



### *Caption on Planning Process*

*Talk about precision in planning! Yes, we worked out the procedure down to the last minute, including leaving time at the beginning for unpredictable events. Was it our science background? In future, perhaps about half-hour should be allocated to the opening speakers and registration. Perhaps, the workshop could start at 8:30 a.m. instead of 9:00 a.m. However, I (Margaret) think this was a well-conceptualised plan.*

*I (Anna-May) feel I need to make the point once again that we did have quite a bit of time in there for eventualities, but I believe that starting earlier than we did would have meant an additional half-hour of waiting to start. Historically, as a people, we have not been able to deal with time with sufficient respect. Of course, I include myself among the “people.”*

## Workshop Activity Guidelines

### **TRINIDAD AND TOBAGO ASSOCIATION FOR SUPERVISION AND CURRICULUM DEVELOPMENT (TTASCD) PORTFOLIO WORKSHOP**

#### **GUIDELINES FOR GROUP ACTIVITY**

Interactive Sessions are in the form of workshops in which participants would be required to develop critical portfolio elements – item sets and the means of assessing them. There are two interactive sessions – the pre-lunch session in which the development of sample portfolio (portfolio) items will be explored, and the post-lunch session in which the assessments of the item produced will be the focus.

For the interactive sessions, participants will be assigned to three large groups, each of which will be supervised by a facilitator. Each group will work in sub-groups of three or four participants. Sub-groups will be assigned in cognate areas – Language, science, mathematics, social studies or modern studies, business studies, and physical performance areas such as art, music, and PE.

#### PRE-LUNCH INTERACTIVE SESSION

Each sub-group is required to:

- Identify a unit of work or topic which is considered appropriate for using the portfolio (characteristics of topic include length of time for coverage, significance to student development, progressive, etc.);
- Identify the level or class for which the portfolio would be used as a teaching strategy;
- Produce an item representative of the work of students at the level identified;
- Prepare a caption for the work produced. The caption should contain the following areas: (1) a statement of the strengths and weaknesses of the piece; (2) how the piece could be improved; (3) what you, as the student, like about the piece; (4) how you would rate it on a scale A, B, and C (where A indicates very good, B is satisfactory, and C means not pleased with the product); and (5) how that piece helped you develop. (**Note:** *all of this is done from the perspective of the student*);
- Review and critique samples of portfolio items on exhibit.

#### POST-LUNCH INTERACTIVE SESSION

Each sub-group is required to continue working on completing an item set by:

- Performing a task analysis for the development of the item in the set;
- Selecting the criteria on which the item would be assessed (confine selection to three critical criteria);
- Developing rubrics for each criterion with at least three levels of performance;
- Indicating the allocation of marks for the various levels under each criterion.

Each member of the sub-group is to write a reflective statement on the day's activities, specifically noting any impact on your understanding/growth/development.

#### PRESENTATIONS

One (or two) item sets – sample portfolio entry, its caption and rubrics for its assessment, as well as sample reflective statements from each of the three large groups will be selected for presentation in the final plenary session.

Each participant should keep a record of the item set for his/her group.

## **Workshop Evaluation Form**

The following item is the evaluation form which participants completed at the end of the workshop. The form was designed to give feedback on various aspects of the conduct of the sessions. Therefore, we obtained a good idea of whether or not our objectives were achieved, and where the strengths and weaknesses in both content and delivery resided. Refer to Section 4 for a summary of the evaluation feedback from workshop participants.

### **Teaching notes and/or activity**

Evaluation is an important component of any activity, for example, a workshop, which has identified goals. The evaluation in the case of the workshop should aim at providing evidence on the degree of success of the workshop, specifically the strengths and weaknesses as perceived by participants. The evaluation also provides an excellent opportunity to obtain evidence about the interests of participants and could set goals for future engagements.

(Evaluation form)

## Examples of Portfolio Items in the Process of Development

The following are three examples of items for a portfolio from students who were required to develop portfolios for a course on Curriculum Development and Teaching Methods, at a local tertiary-level institution. As part of the portfolio development strategy, students pursuing the course were required to read a handout pertinent to the subject matter and write a one-page summary. They were then required to grade their accounts and give reasons for the grade they awarded. They were also required to say how their accounts could be improved. The one-page summary served as a portfolio item, and the grading and critique of the summary served as the associated caption.

The workshop participants were required to peruse and critique these samples of work so that they, in turn, would become familiar with the processes involved in constructing appropriate portfolio items.

### **Teaching notes and/or activity**

The captions were used as a strategy to develop reflective skills. Students were invited to grade their work and account for the grade given. This required them to think through what they had done and how they did it. By asking them to grade their work, we start the process of reflection. The examples of students' work shown illustrate how these students *chose* to engage in the process and how they began to develop aspects of reflection.

**(Sample 1 of portfolio items)**

**(Sample 2 of portfolio items)**

(Sample 3 of portfolio items)



# SECTION 3

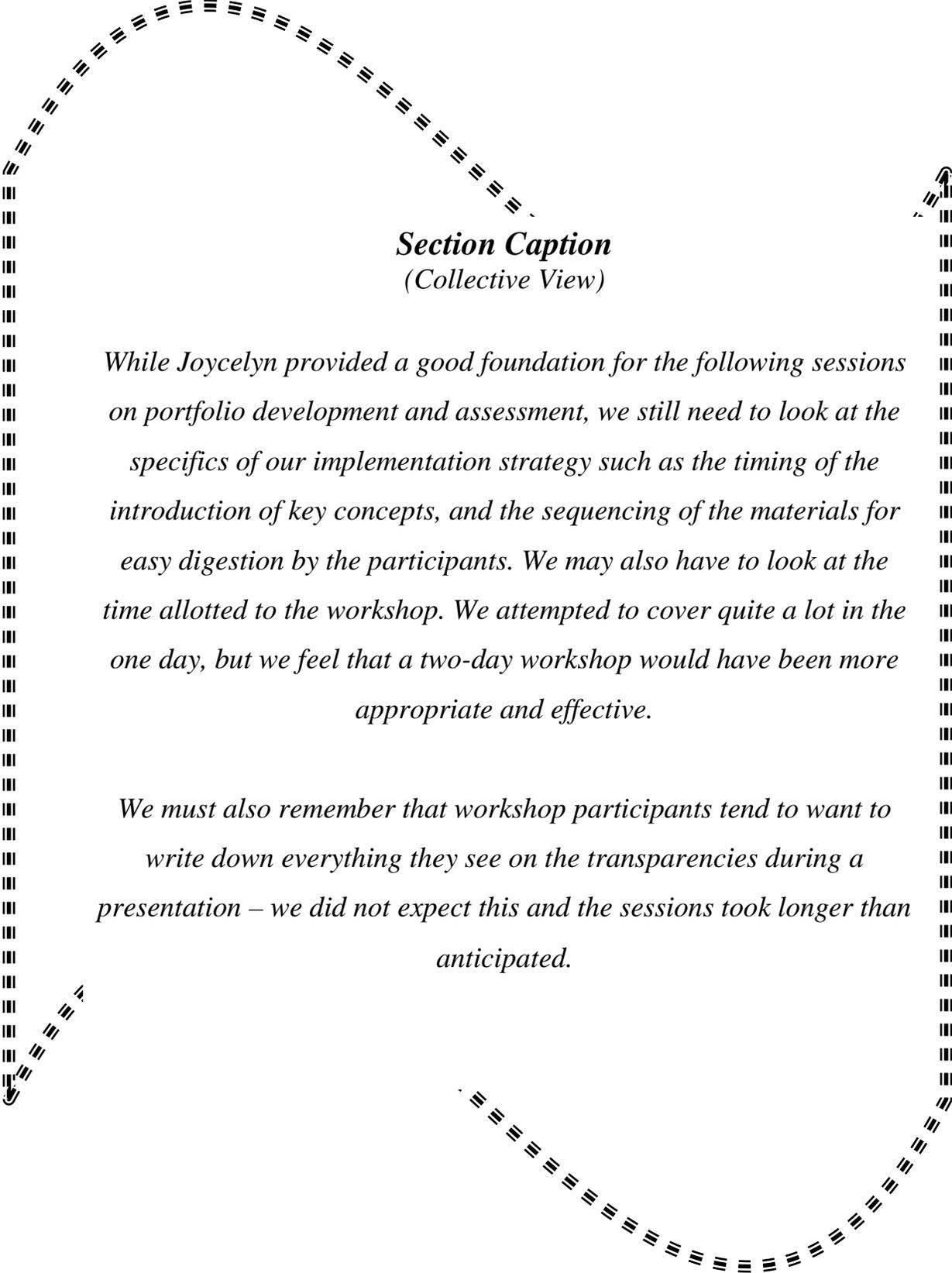
## WORKSHOP IMPLEMENTATION PROCEDURE



## SECTION CONTENTS

- Section Caption
- Introduction
- Joycelyn's Reflections on Her Presentation
- Outline of Joycelyn's Presentation and Supporting  
Transparencies and Attendant Amendments
- Margaret's Reflections on Her Presentation
- Outline of Margaret's Presentation and Supporting  
Transparencies
- Captions for the Portfolio Assessment Presentations  
[Reflections on Anna-May's Presentation]
- Outline of Anna-May's Presentation and Supporting  
Transparencies





**Section Caption**  
(Collective View)

*While Joycelyn provided a good foundation for the following sessions on portfolio development and assessment, we still need to look at the specifics of our implementation strategy such as the timing of the introduction of key concepts, and the sequencing of the materials for easy digestion by the participants. We may also have to look at the time allotted to the workshop. We attempted to cover quite a lot in the one day, but we feel that a two-day workshop would have been more appropriate and effective.*

*We must also remember that workshop participants tend to want to write down everything they see on the transparencies during a presentation – we did not expect this and the sessions took longer than anticipated.*

## **Introduction**

Workshop implementation covered three areas. First, there was an overview of the portfolio as an alternative assessment strategy, which took the form of a plenary presentation session. This was followed by a second presentation session in which the portfolio as an instructional strategy was examined. This presentation had a supporting interactive session in which participants simulated the development of portfolio items in a classroom setting. The third session, which took place after the luncheon break, addressed portfolio assessment. This session also commenced with a presentation and was supported by an interactive session. Participants had to complete scoring rubrics and mark schemes for items created in the pre-lunch session.

The following outlines the sequence of events in the implementation of the workshop:

- Situating the portfolio within the alternative assessment paradigm
- Introducing participants to portfolio features and to the jargon associated with portfolio and its usage
- Introducing the use of the portfolio as an instructional strategy
- Developing portfolio items by participants, including determining the purpose of the portfolio
- Introducing the use of the portfolio as an assessment strategy
- Developing rubrics and scoring schemes for portfolio items produced in the earlier session
- Presenting of item sets developed by participants in their work groups
- Reflecting on and evaluating the workshop.

## *Joycelyn's Reflections on Her Presentation*

*From my own reflection and discussion with my colleagues, I identified three areas of weakness in my presentation: (a) I should have given the participants a quick overview of my presentation (something like the role of assessment, the changing face of assessment, traditional vs. alternative assessment, examples of alternative assessment strategies; the place of the portfolio). This surely would have given participants a better focus; (b) I spent too little time on alternative assessment.*

*Participants should have been exposed to forms of alternative assessments; and (c) in highlighting the portfolio, I should have given some indication of the nature of the portfolio--some brief statement that would have been further developed in Margaret's presentation. This would have cleared up the confusion for the participant who asked the question at the end of my presentation, "But what is a portfolio?" Therefore, I have made some change in the presentation format and in the supporting transparencies to correct these weaknesses.*

*In spite of the above shortcomings, the presentation did set the stage for the sessions that followed.*

## **OUTLINE OF JOYCELYN'S PRESENTATION**

### **ALTERNATIVE ASSESSMENT: THE PLACE OF THE PORTFOLIO (15 min.)**

**OVERVIEW:** The role of assessment in the teaching/learning process

#### SHIFTING PARADIGM – CHANGES IN EDUCATIONAL ASSESSMENT

- Recognition of the need for changes
- Factors contributing to demands for assessment reform
  - Different educational goals--outcomes relate to lifelong learning
  - Changing relationship between assessment and teaching/learning--learning is no longer an accumulation of discrete skills
  - Need for reporting systems that provide information on what students know and can do

#### LEARNING AND ASSESSMENT PRACTICES

- Current models of learning are based on cognitive psychology which calls for an active, constructive approach to learning
- Learners gain understanding when they construct their own knowledge, and this is reflected in contemporary instructional methods
- Assessment must be linked to holistic learning and must mirror the learning process--hence the movement to alternative modes of assessment

#### COMPARISON OF TRADITIONAL ASSESSMENT AND PORTFOLIO ASSESSMENT

(see transparency)

#### KEY FINDINGS FROM PORTFOLIO RESEARCH

Since the portfolio is becoming more and more important as an instructional and assessment tool, it has become the focus of many research initiatives. Some findings from portfolio research have been highlighted (see transparency).

#### CHANGING ROLE OF THE TEACHER

It follows that since instructional and assessment methods are changing, new roles are emerging for the teacher (see transparency).

## **Changes to Presentation, Based on Self-Evaluation of the Presentation**

PRESENTATION OUTLINE (see transparency)

### SHIFTING PARADIGM – CHANGES IN EDUCATIONAL ASSESSMENT

- Recognition of the need for changes
- Factors contributing to demands for assessment reform
  - Different educational goals--outcomes relate to lifelong learning
  - Changing relationship between assessment and teaching/learning--learning is no longer an accumulation of discrete skills
  - Need for reporting systems that provide information on what students know and can do

### LEARNING AND ASSESSMENT PRACTICES

- Current models of learning are based on cognitive psychology which calls for an active, constructive approach to learning
- Learners gain understanding when they construct their own knowledge, and this is reflected in contemporary instructional methods
- Assessment must be linked to holistic learning and must mirror the learning process--hence the movement to alternative modes of assessment

### COMPARISON OF TRADITIONAL AND ALTERNATIVE METHODS OF ASSESSMENT

- Traditional assessment has a narrow focus, providing only a snapshot of student learning, whereas alternative assessment has a much wider focus. It may look at achievement over time, and recognises effort and achievement
- Traditional assessment is teacher controlled--teacher makes all the decisions with regards selection of content, time, and so on. Alternative methods encourage student participation in the assessment process
- Traditional methods separate assessment from the learning process, whereas alternative methods seek ways to integrate assessment with learning

### EXAMPLES OF ASSESSMENT STRATEGIES

- Examples of traditional pencil and paper tests (see transparency)
- Examples of some alternative methods (see transparency)
- The portfolio is an example of an alternative strategy that links assessment with teaching and learning (to be further explored in the next session)

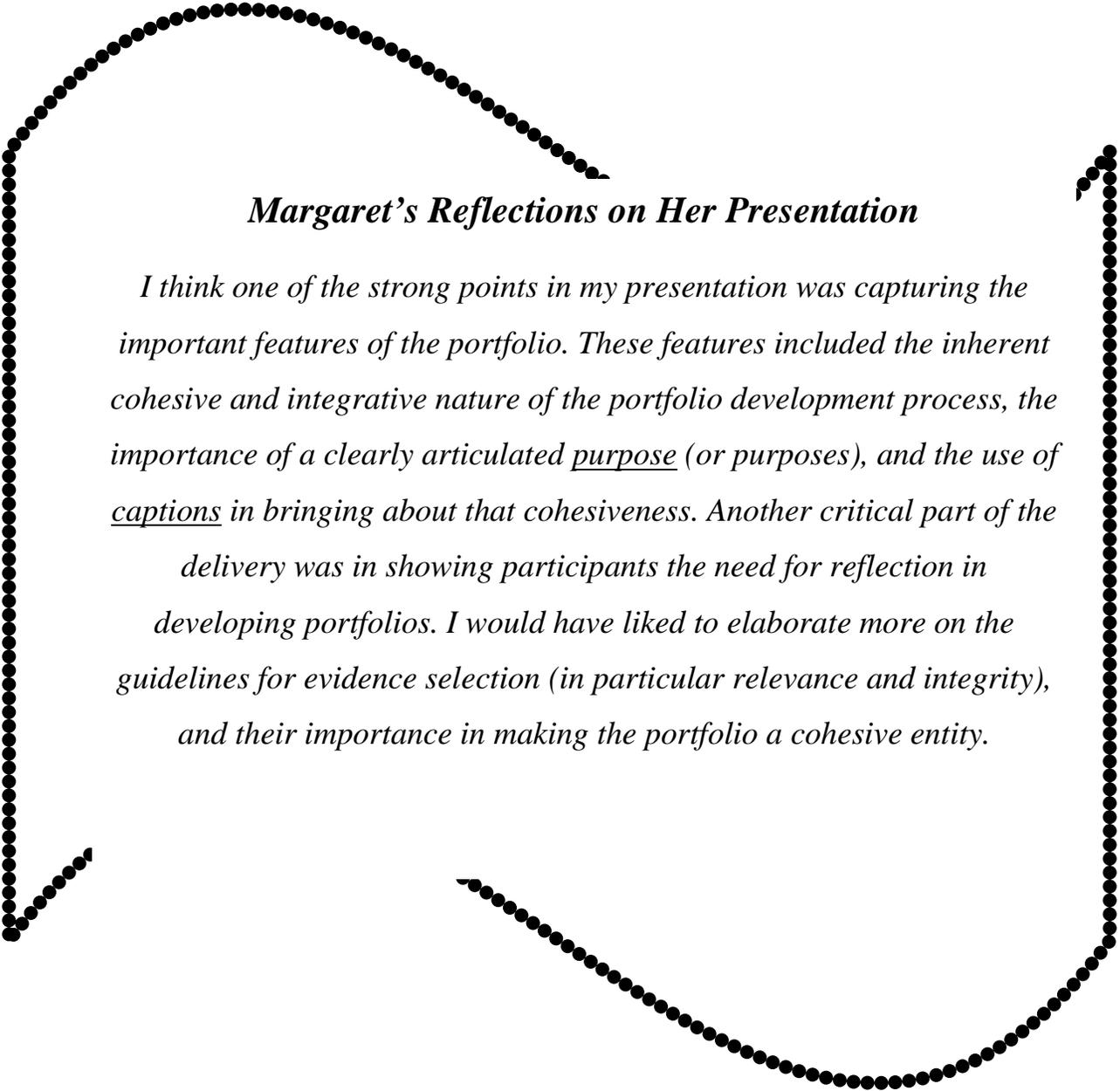
### KEY FINDINGS FROM PORTFOLIO RESEARCH

Since the portfolio is becoming more and more important as an instructional and assessment tool, it has become the focus of many research initiatives. Some findings from portfolio research have been highlighted (see transparency).

### CHANGING ROLE OF THE TEACHER

It follows that since instructional and assessment methods are changing, new roles are emerging for the teacher (see transparency).

(Joycelyn's transparencies)



### *Margaret's Reflections on Her Presentation*

*I think one of the strong points in my presentation was capturing the important features of the portfolio. These features included the inherent cohesive and integrative nature of the portfolio development process, the importance of a clearly articulated purpose (or purposes), and the use of captions in bringing about that cohesiveness. Another critical part of the delivery was in showing participants the need for reflection in developing portfolios. I would have liked to elaborate more on the guidelines for evidence selection (in particular relevance and integrity), and their importance in making the portfolio a cohesive entity.*

**Teaching notes and/or activity**

This presentation session focussed on the first major issues in portfolio development. The features of the portfolio were identified and explanations were given about the representation of each of the features identified in the construction of a portfolio. Descriptions were supported by highlights on transparencies. The presentation guide and transparencies for this session are provided.

## OUTLINE OF MARGARET'S PRESENTATION

### A PRACTICAL APPROACH TO DESIGNING A PORTFOLIO (30 min.)

#### KEY PORTFOLIO FEATURES: Purpose/s and Evidence

##### WHAT IS/ARE THE PURPOSE/S OF THE PORTFOLIO? (5 min.)

Purpose/s: includes the Goals and/or Use of the portfolio

- *Goal*: refers to the *knowledge* and *skills* to be developed through the portfolio
- *Use*: how the portfolio will be *utilised*

*Purpose/s must be clearly defined before portfolio development begins*

##### WHAT TYPES OF EVIDENCE ARE NEEDED? (5 min.)

- *Artifacts*: produced by the student in the normal course of work
- *Productions*: prepared specifically for the portfolio--purpose/s, captions, and reflective statements
- *Reproductions*: items which typify events in the work of the student developing the portfolio, but events that are not usually captured
- *Attestations*: refer to testimonials on the work of the student

##### DECISIONS RE SELECTION OF DOCUMENTS (ITEMS) (5 min.)

**(What documents are necessary & sufficient evidence for the intended purpose?)**

- Who decides on what to include?
- How much should be included?
- How should the evidence be organized?

##### APPROACHES TO SELECTION OF EVIDENCE (5 min.)

- *Extremely structured* (the items are prescribed by the teacher)
- *Completely unstructured* (students can choose what they want for the portfolio)
- *Moderate position* (specify categories of entries, with students free to select work for each category)

##### GUIDELINES FOR SELECTING EVIDENCE (5 min.)

- *Relevance*: items must be *clearly* and *directly* related to the purpose of the portfolio
- *Integrity*: items must relate to *each other* in addition to the overall purpose
- *Rigour*: items must reflect *breadth* and *depth* of thinking
- *Authenticity*: items should be the result of student's own efforts

##### IMPORTANT TIPS (5 min.)

- Engage students in reflective discourse and *writing*
- Select appropriate topic/skills to be studied through portfolio development (include significance to student development, progressive, etc.)
- Work out time frame: length of time for coverage, etc.
- Where possible, timetable for peer review sessions (promotes collaboration)
- First attempt at portfolio use should be small and manageable (avoid high stakes assignment--such as for CXC--on your first attempt)

##### PRE-LUNCH INTERACTIVE SESSION (cf. participants' handout)

Each sub-group is required to:

- Identify a unit of work or topic which is considered appropriate for using the portfolio
- Identify the level or class for which the portfolio would be used as a teaching strategy
- Produce an item representative of the work of students at the level identified
- Prepare a caption for the work produced.
- Review and critique samples of portfolio items on exhibit (see Outline of Workshop Activity handout)

(Madge's Transparencies)

(Madge's Transparencies)

(Madge's Transparencies)

(Madge's Transparencies)

(Madge's Transparencies)

## CAPTIONS FOR THE PORTFOLIO ASSESSMENT PRESENTATION

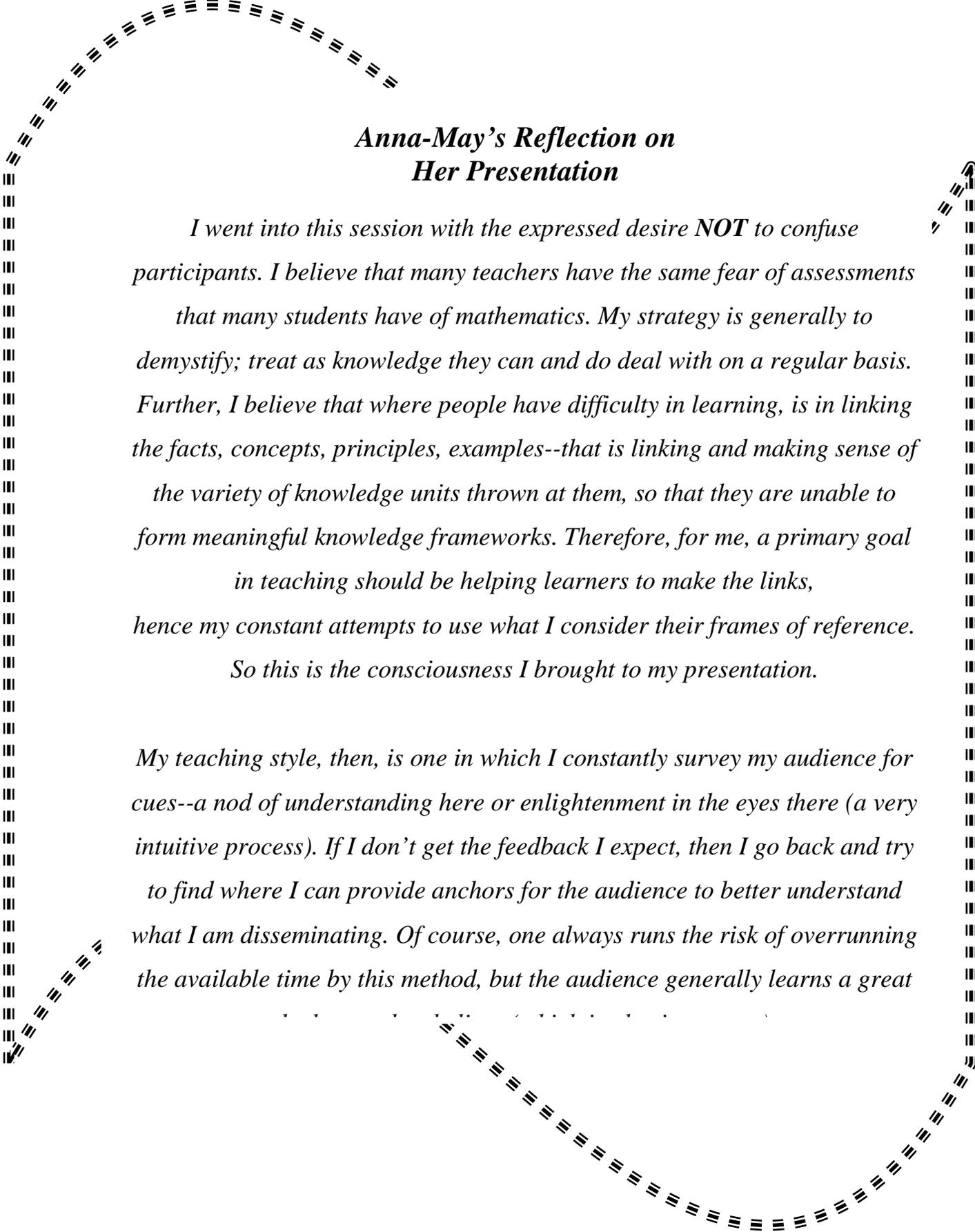
### *Margaret's Reflections on Anna-May's Presentation*

*In the true spirit of portfolio development, this session pulled the concepts/features (highlighted in the earlier sessions) together, so that, the:*

- reflection/self analysis*
- authenticity*
- learner-centredness, etc.*

*of the portfolio process were crystallised. I believe the participants got the salient points involved in portfolio assessment in the classroom setting.*

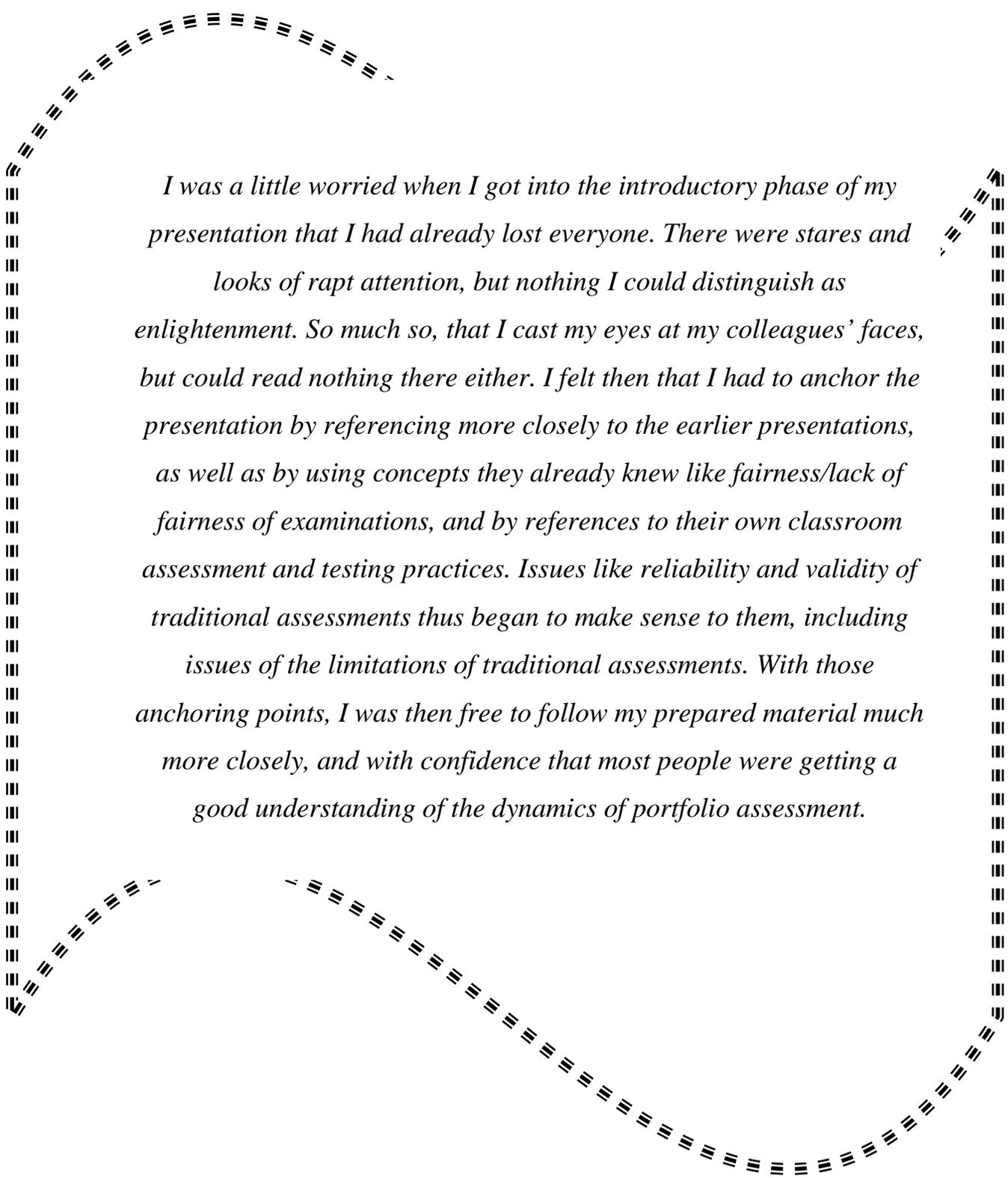
*What was outstanding about this presentation was that it dealt with generic assessment issues--reliability, validity, fairness--in a way that participants got exposure at two levels: what those terms mean in the traditional context and what they mean in the alternative assessment paradigm.*



## ***Anna-May's Reflection on Her Presentation***

*I went into this session with the expressed desire **NOT** to confuse participants. I believe that many teachers have the same fear of assessments that many students have of mathematics. My strategy is generally to demystify; treat as knowledge they can and do deal with on a regular basis. Further, I believe that where people have difficulty in learning, is in linking the facts, concepts, principles, examples--that is linking and making sense of the variety of knowledge units thrown at them, so that they are unable to form meaningful knowledge frameworks. Therefore, for me, a primary goal in teaching should be helping learners to make the links, hence my constant attempts to use what I consider their frames of reference. So this is the consciousness I brought to my presentation.*

*My teaching style, then, is one in which I constantly survey my audience for cues--a nod of understanding here or enlightenment in the eyes there (a very intuitive process). If I don't get the feedback I expect, then I go back and try to find where I can provide anchors for the audience to better understand what I am disseminating. Of course, one always runs the risk of overrunning the available time by this method, but the audience generally learns a great*



*I was a little worried when I got into the introductory phase of my presentation that I had already lost everyone. There were stares and looks of rapt attention, but nothing I could distinguish as enlightenment. So much so, that I cast my eyes at my colleagues' faces, but could read nothing there either. I felt then that I had to anchor the presentation by referencing more closely to the earlier presentations, as well as by using concepts they already knew like fairness/lack of fairness of examinations, and by references to their own classroom assessment and testing practices. Issues like reliability and validity of traditional assessments thus began to make sense to them, including issues of the limitations of traditional assessments. With those anchoring points, I was then free to follow my prepared material much more closely, and with confidence that most people were getting a good understanding of the dynamics of portfolio assessment.*

# OUTLINE OF ANNA-MAY'S PRESENTATION

## PORTFOLIO ASSESSMENT

### INTRODUCTION (*Transparency 1 – Session overview*)

- Alternative assessment
- Performance-based assessment
  - More accurate picture of learning process and learner--reflective, constructive, self-regulated, meta-cognitive, contextual

### CHARACTERISTICS OF PERFORMANCE BASED ASSESSMENT (*Transparency 2*)

- Clear purpose
- Observable aspects
- Means of eliciting performance
- Clearly articulated scoring procedures

### PORTFOLIO ASSESSMENT AS PERFORMANCE-BASED

#### SELECTING ASSESSMENT METHOD

- What is to be assessed? Product, process, both?
- What are the levels of achievement the assessment targets? Recall, higher-order skills, manipulative skills?

#### RUBRICS (*Transparency 3*)

- What are they? Guides to assessing levels of performance of significant tasks identified for students to perform
- Purpose rubrics serve - ensure objective, fair, and reliable assessments; focus on essential tasks, provide benchmarks or standards; promote self-assessment and allow feedback
- Importance of rubrics - related to the requirements of reliability, validity and fairness of traditional assessments. Highly subjective nature of performance assessments. Excellent for classroom use; challenging for more universal use and high stakes decision making (refer to the characteristics of performance-based assessment in Introduction)

#### DEVELOPING RUBRICS AND SCORING SCHEMES (*Transparencies 4-7*)

- Task analysis – what students required to do
- Criteria definition – significant tasks
- Levels of performance for each criterion – benchmarks or standards
- Descriptors for each criterion level
- Assign marks to criterion levels along a continuum

#### ANALYTIC AND HOLISTIC SCORING RUBRICS (*Transparencies 8-10*)

- Slater's model for analytic scoring (scoring of individual pieces)
- Slater's model for holistic scoring (based on scoring of individual pieces)
- Holistic scoring using general portfolio characteristics – for example, presentation, content, creativity, relevance of items, reflection
- Diverse perceptions and construction of rubrics for same assessment possible

#### IMPLICATIONS OF THE SUBJECTIVE NATURE OF SCORING RUBRICS

- Need for clarity
- Significance of task
- Scrutiny and review of rubrics
- Negotiating rubrics

PRACTICAL ACTIVITY

Develop a set of scoring rubrics for the item you produced earlier today. Clearly show tasks, criteria of significance, levels of performance, and score allocation.

Consider the criteria you are likely to use for the assessment of the completed portfolio.

(Anna-May's transparencies)



# SECTION 4

# WORKSHOP PRODUCTS



## SECTION CONTENTS

- Introduction
- Caption for Workshop Products
- Samples of Item Sets
  - Simulated Student Portfolio Items Including  
Portfolio Purpose and Item Captions
- Simulated Teacher Objectives and Scoring Schemes
- Summary of Participants' Evaluation of the Workshop
- Evaluation Caption



## Introduction

The portfolio workshop yielded products in the form of item sets, which are examples of how items for a portfolio *may* be created, and how to develop the characteristics of the portfolio within the items. This exercise was the critical teaching/learning strategy that we used for portfolio development.

The workshop participants produced nine item sets. Because of space constraints, only three were selected for inclusion in the manual. Selection of these three was based on the following criteria:

- They addressed different teaching levels - lower secondary, upper and lower primary.
- They represented more than one subject area - Language Arts, social studies
- They clearly represented the concepts identified for the portfolio
- They illustrated how the components of a portfolio are integrated

This section also contains the evaluation summaries of the participants.

### **Teaching notes and/or activity**

Ideally, a workshop should result in products that are meaningful to the participants. These products illustrate how meaningful objects may be derived through workshop activity.

### *Caption for Workshop Products*

*These workshop products were selected for this portfolio because they illustrate, very well, the things that go into creating a portfolio item. They capture the nature of the items themselves and show quite clearly how one could approach the development of appropriate captions and how, in turn, captions can lead to the deeper reflection.*

*The components of the workshop products also showed means of distinguishing portfolio components. For instance, they show that the purpose of the portfolio is stated by the student; not the teacher, although the teacher has her own objectives for the student's engagement in the portfolio development process. They also clearly show that the teacher's comment on a portfolio item could be included as an attestation, but it is not a product of the portfolio developer.*

#### **Teaching notes and/or activity**

In selecting items for a portfolio, care must be taken to ensure that the items provide appropriate and adequate evidence for the stated purpose of the portfolio. Specifically, selection criteria include relevance, integrity, rigour, and authenticity.

## Example 1

### SIMULATED STUDENT'S WORK

#### SOCIAL STUDIES

Level: Standard 3  
Topic: Family  
Purpose: The important role my family plays in my life  
Item: Biography: A Day In My Life

**Item:      A DAY IN MY LIFE**

I live with my mummy, daddy, two brothers, my aunty, my cousin and a pet. We don't spend much time with each other because mummy and daddy work a lot. When I go home I watch T.V. and play with my dog or friends in the road until they come. When I know they will reach home I go and pick up a book. When they come I eat and mummy ask me if my home-work is done. We don't really talk. My daddy always say. Be quiet. Sometimes they quarrel plenty and I don't like it and I feel sad. I wish for another daddy and mummy.

**Caption:**

I could have improved the piece by writing a nicer part of my life. I especially like my work because I got to talk about myself. I should get a Grade B because I wrote exactly what my day is like.

Example of an  
attestation

**Teacher's Comment:**

An honest presentation. But, you could have given some more details.

**Teaching notes and/or activity**

This is a good example of an item to be included in a portfolio, since it represents a child's work in the language and experiences of the child. The purpose of the portfolio is clear and the caption for the item is appropriate.

## SIMULATED TEACHER'S WORK

### SCORING SCHEME

#### BIOGRAPHY – A DAY IN MY LIFE

|  | GRADE |
|--|-------|
| / Identifies the role that each family member plays in life<br>/ Focuses on relationship with members<br>/ Relates both positive and negative aspects of life<br>/ Organizes materials (sequence)<br>/ Factual | A     |
| / Identified role of some members<br>/ Focuses on only one aspect (positive or negative)<br>/ Lacks some organization<br>/ Little focus on relationships with members<br>/ Ambiguous                           | B     |
| / Did not identify the role of family members<br>/ Did not expand on relationships with members<br>/ Fictitious material   | C     |
| / Misinterpreted task  | D     |

#### Teaching notes and/or activity

Teachers should develop rubrics for scoring the items in the portfolio as well as for overall portfolio assessment. Ideally, these rubrics should be developed beforehand and could be modified later if necessary.

Using the rubrics above, grade the sample of the relevant student's work.

## Example 2

### SIMULATED STUDENT'S WORK

#### SOCIAL STUDIES FORM THREE

**Unit Topic:** Environment – Causes of Flooding  
**Time:** Five (5) weeks  
**Purpose:** To help me understand the causes of flooding in Mango Village

#### THE INTERVIEW

- Q: Did Mango Village always flood?  
R: Yes, Mango Village has had flooding for many years, particularly during the rainy season.
- Q: Is this the worst flooding that you have seen in Mango Village?  
R: This is the worst flooding that I have seen and I have been living in this village for 50 years.
- Q: Why do you think that this flooding is so bad?  
R: There are several reasons, for example:
- we have had continuous rain for one week;
  - the ground has become saturated;
  - the land is low and the quarry operator upstream ... there has been an increased amount of silting in the river;
  - to make matters worse, the corporation hasn't been getting sufficient funds and equipment from the government.

#### Caption

(Interview with Councillor Barry at his office on Friday 1<sup>st</sup> December, 2000)

- Importance:** I found that the information in this interview showed many causes of flooding that were not mentioned in the newspaper clipping from item 3. I think that it is important to know all of the causes of flooding.
- Strengths:** Mr. N. Barry, the Councillor for Mango Village is a very important, well-respected person in the community and he has knowledge of flooding in Mango Village. He grew up and still lives in Mango Village.
- Weaknesses:** Mr. N. Barry did not have any pictures to show the causes of flooding that he spoke about.
- Improvement:** I should have asked more questions about prevention of flooding.
- Rating:** I thought the interview went really well. Mr. Barry was very nice and he answered all my questions.

## SIMULATED TEACHER'S WORK

### **SOCIAL STUDIES: The Environment - Causes of Flooding**

#### Teacher's Objectives

- To recognise and understand the causes of flooding
- To identify ways to help prevent or alleviate problems associated with flooding
- To develop greater awareness of their communication
- To develop research skills

#### **Teaching notes and/or activity**

This item set fully exemplifies the processes involved in portfolio development.

**Note.** Teacher's objective is clearly defined. Student's purpose for developing the portfolio is different and clearly stated.

The caption for this piece also demonstrates the construct of integrity, since reference is made to another item included in the portfolio. Integrity shows the relationship between/among items.

## Scoring Scheme

| Criteria   | Mark   |
|--|--|
| <b>Research Method</b> <ul style="list-style-type: none"> <li>▶ Method produced sufficient information</li> <li>▶ Method produced insufficient information</li> <li>▶ Method produced no relevant information</li> </ul> | <b>2</b><br><br><i>2</i><br><i>1</i><br><i>0</i>             |
| <b>Accuracy of Information</b> <ul style="list-style-type: none"> <li>▶ All information accurate</li> <li>▶ Most information accurate</li> <li>▶ Some information accurate</li> <li>▶ Totally inaccurate</li> </ul>      | <b>3</b><br><br><i>3</i><br><i>2</i><br><i>1</i><br><i>0</i> |
| <b>Basic/Core Causes Identified</b> <ul style="list-style-type: none"> <li>▶ Four or more causes</li> <li>▶ Two or three causes</li> <li>▶ One cause</li> <li>▶ No causes identified</li> </ul>                          | <b>3</b><br><br><i>3</i><br><i>2</i><br><i>1</i><br><i>0</i> |
| <b>Evidence of Reflection</b> <ul style="list-style-type: none"> <li>▶ Strong evidence</li> <li>▶ Weak evidence</li> <li>▶ No evidence</li> </ul>  | <b>2</b><br><br><i>2</i><br><i>1</i><br><i>0</i>             |
| <b>Total</b>   | <b>10</b>  |

### Teaching notes and/or activity

Use the scoring scheme above, which was devised for the item set, to grade the student's work.

### Example 3

## SIMULATED STUDENT'S WORK

### UNIT OF WORK: Poetry - Appreciation of Writing

**Level:** Standard 5  
**Time:** 3 weeks  
**Purpose:** To show why I enjoy listening to, reading, and writing poems.  
**Item:** Poem: **ME**

1. My name is Cindy  
I like to eat candy  
I go to school  
I don't want to be a fool.
2. My best friend is Ria  
She has a CD-player  
When she listens to rap  
Her mother says that is crap!
3. My teacher is so dramatic  
We do poetry in Mathematics  
Science and Social Studies are interesting too  
But this is all I can write for you.

### CAPTION

Poem: **ME**

1. I put this poem in my portfolio because I wanted to write a poem and share it with you.
2. I think I've learned to rhyme well. I surprised myself by writing three stanzas (new word!)  
I think the third line in my last stanza is too long.
3. Maybe I could say Other subjects are interesting too.  
I could use Direct Speech in line 4, Stanza 2.
4. I like how I can say so much about myself in a poem.  
I like how it rhymes.
5. **GRADE: A!**
6. I feel I can write about something else.  
I feel I can write about anything.  
I feel I'm a poet!

## SIMULATED TEACHER'S WORK

### Mark Scheme

| Criteria           | Mark      |
|--------------------|-----------|
| 1. Rhyming         | 5         |
| 2. Use of Language | 4         |
| 3. Theme           | 2         |
| <b>Total</b>       | <b>11</b> |

### Scoring Rubrics

|  |                                  |
|--|----------------------------------|
| <p><b>Rhyming</b></p> <ul style="list-style-type: none"> <li>• Excellent pattern: all lines rhyme</li> <li>• Good pattern: most lines rhyme</li> <li>• Adequate pattern: some lines rhyme</li> <li>• Poor pattern: very few lines rhyme</li> <li>• Lacking pattern: no lines rhyme</li> </ul>  | <p>5<br/>4<br/>3<br/>2<br/>1</p> |
| <p><b>Use of Language</b></p> <ul style="list-style-type: none"> <li>• Very appropriate: authentic to level of child, relevant to theme</li> <li>• Sufficiently appropriate: authentic to level of child, but not very relevant to theme</li> <li>• Insufficiently appropriate: not authentic to level of child, but relevant to theme</li> <li>• Inappropriate: neither authentic to level of child, nor relevant to theme</li> </ul> | <p>4<br/>3<br/>2<br/>1</p>       |
| <p><b>Theme</b></p> <ul style="list-style-type: none"> <li>• Strong link to theme</li> <li>• Weak link to theme</li> </ul>   | <p>2<br/>1</p>                   |

## Example 4

### SIMULATED STUDENT'S WORK

**SUBJECT:** Language Arts

**Topic:** Poetry

**Level:** Form One

**DURATION:** Two (2) weeks

### Student's Purpose

My portfolio shows how well I understand poetry, the main ideas, my feelings and the special picture I can imagine.

### Item 1

Response to the poem "Bottle Man" by Rudolph Singh.

This poem is about a poor man who has become a vagrant. He is young but he looks old. I feel sorry for him--like a corbeau, he searches in the mud for bottles to sell.

### Caption

This was included in my project because it made me think about myself, my friends, and what could happen to us if we are not careful.

**Rating:** A

## SIMULATED TEACHER'S WORK

### SUBJECT: Language Arts: Poetry

#### Teacher's Objectives

Students will be able to:

- identify the Main Themes, Mood, Tone, Rhythm, and Imagery of **Poetry**
- demonstrate understanding of these concepts/constructs through various activities.

#### Scoring Scheme

| Criteria     | Performance Statements  | Weighting |
|--------------|---|-----------|
| Theme        | /   | <b>3</b>  |
|              | Identifies the theme with two supportive statements                     | 3         |
|              | Identifies the theme with one supportive statement                      | 2         |
|              | Identifies the theme with no supportive statements                      | 1         |
|              | No theme identified   | 0         |
| Imagery      | /   | <b>2</b>  |
|              | Illustrates clearly in any medium two examples of imagery from the poem | 2         |
|              | Illustrates vaguely in any medium two examples of imagery from the poem | 1         |
|              | No illustration of imagery  | 0         |
| Mood         | /   | <b>1</b>  |
|              | Clearly identifies mood   | 1         |
|              | Mood <u>not</u> clearly identified                                      | 0         |
| <b>Total</b> |   | <b>6</b>  |

### **Teaching notes and/or activity**

It is important to note that constructing captions is one of the most challenging areas of developing the portfolio.

The caption for the item set, Example 3, is very instructive. The student is responding to questions that are used to guide his/her reflections.

As suggested earlier, one strategy that could be used to help students develop their reflective skills is to ask leading questions like:

- What grade would you give the piece of work?
- Why would you give it that grade?
- How could you have improved on it?

These questions are concrete and easy for students to relate to.

As students become increasingly reflective, another strategy which could be used is to ask more qualitative questions like:

- Why do you like this piece of work?
- How does this piece of work help you fulfill the purpose of the portfolio?

## **SUMMARY OF PARTICIPANTS' EVALUATION OF THE WORKSHOP**

Participants were required to complete the workshop evaluation form quite apart from writing their own reflections on the workshop.

The evaluation addressed four issues. These were:

1. The extent to which participants' expectations of the workshop were fulfilled
2. Participants' views on the effectiveness of various aspects of the workshop
3. Participants' suggestions for improving the workshop
4. The types of workshops in which they would like to participate in the future.

### **Participants' Expectations**

Participants were required to list three expectations that they had for the workshop, and to indicate the extent to which these expectations were fulfilled.

Of the 45 participants present, 31 (64%) had one or two of their expectations fulfilled, either completely or to a great extent.

Among the many expectations of the participants were the following:

- Gaining knowledge and materials on portfolio and portfolio development
- Developing skills to help students develop portfolios
- Using the portfolio as an instructional strategy
- Knowledge of portfolio assessment
- Clarification of the concept of rubrics
- Development of rubrics and mark schemes
- Engaging in group reflections and discussion

In the participants' own words, some of these ideas were expressed as follows:

- "To be able to assist pupils to develop portfolios."
- "To assess portfolios."
- "To be equipped with practical strategies for implementing the use of portfolio in my class."
- "To learn how to develop rubrics for scoring portfolios."
- "To understand the appropriate use of portfolio within the context of our existing education system."
- "Explanation of rubrics of the portfolio (How to write rubrics.)"
- "Activities in working out items for the portfolio."
- "Scoring the portfolio."
- "I expected to see a variety of current presentation strategies/techniques employed."
- "To engage in group reflection/discussion to stimulate/develop/extend ideas of presentation."
- "To get clarification on designing rubrics."

### **Effectiveness of Workshop Segments**

Participants were required to indicate the extent to which they agreed with preconceived statements about the workshop.

The majority of participants found that the various segments of the workshop were well planned and executed. The following are the statements to which participants responded: (The figures represent the percentage of participants who agreed/strongly agreed with each statement.)

- |   |     |
|---|-----|
| ▪ The workshop was well organised   | 99% |
| ▪ The plenary sessions were insightful  | 87% |
| ▪ Handouts were useful  | 83% |
| ▪ Audio-visual materials were used effectively  | 76% |
| ▪ The interactive sessions were interesting and useful  | 93% |
| ▪ Participation in the workshop has provided you with skills to implement portfolio assessment in the classroom | 80% |

### **Improving the Workshop**

Participants were asked to suggest one way in which the workshop might be more effective.

Much of the criticism of the workshop centred on time--an insufficiency of it. Many participants felt that more than one day should have been allotted for the workshop, and that the time allocation for critiquing the work produced in the interactive sessions was not adequate. A few participants felt that presenters could have spent more time on rubric development and the interactive times could have been longer. Some participants would have liked to see actual samples of portfolios.

### **Future Plans**

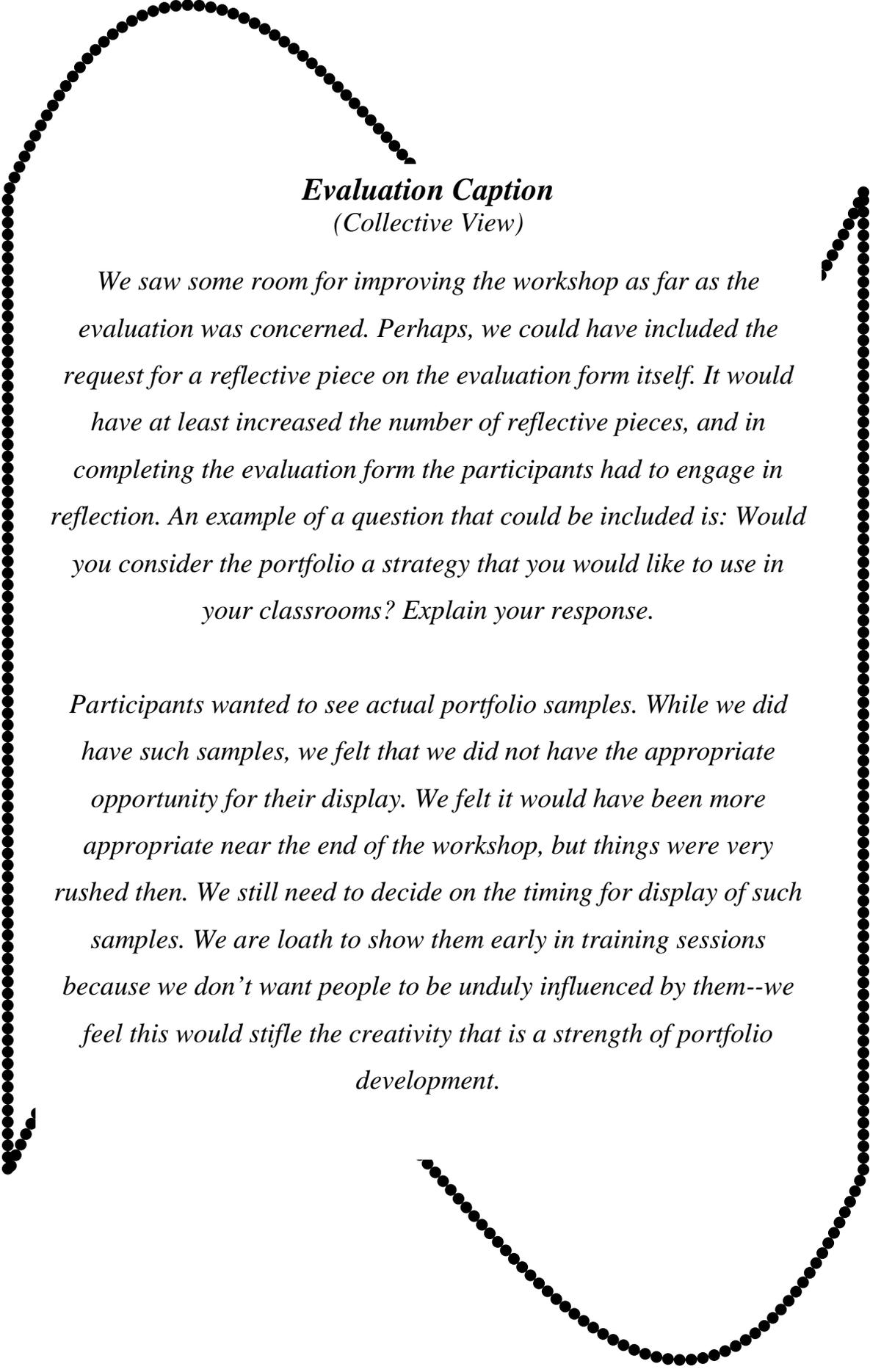
Participants were asked to indicate topics that they would like to see addressed in future workshops.

Suggestions for workshops related to the portfolio included:

- More on portfolio assessment
- Other forms of alternative assessment
- Rubrics
- Journal writing
- Project work
- Selecting items for the portfolio

Other suggestions:

- Teaching strategies for learners with learning disorders
- Alternative forms of discipline
- Teacher as curriculum developer
- Classroom management



***Evaluation Caption***  
*(Collective View)*

*We saw some room for improving the workshop as far as the evaluation was concerned. Perhaps, we could have included the request for a reflective piece on the evaluation form itself. It would have at least increased the number of reflective pieces, and in completing the evaluation form the participants had to engage in reflection. An example of a question that could be included is: Would you consider the portfolio a strategy that you would like to use in your classrooms? Explain your response.*

*Participants wanted to see actual portfolio samples. While we did have such samples, we felt that we did not have the appropriate opportunity for their display. We felt it would have been more appropriate near the end of the workshop, but things were very rushed then. We still need to decide on the timing for display of such samples. We are loath to show them early in training sessions because we don't want people to be unduly influenced by them--we feel this would stifle the creativity that is a strength of portfolio development.*



SECTION 5

REFLECTIONS



## SECTION CONTENTS

- Facilitators' Reflections
  - Collective View
  - Personal Views
- Participants' Reflections



## **FACILITATORS' REFLECTIONS** (COLLECTIVE VIEW)

*The workshop was very rewarding for us. There was a sense of accomplishment--we felt we achieved the objectives in that the evidence showed that there was a grasp of the concepts. At the end, however, everyone wanted to show what they had learnt. That tells us that they felt they did something that they wanted to show--they had learnt something new. Of course, there were other signs that the objectives were being achieved.*

*Some of the participants commented that what they were doing in the schools under the guise of 'portfolio' did not reflect the portfolio concept. We could see enlightenment virtually dawning on them as they began to understand the process in which they were involved. We could also gauge success by the request of some participants to conduct workshops of a similar nature for their schools. We were particularly pleased with the kind of creativity that was generated during the exercise. Groups attempted different types of evidence, for example, forms of attestations (e.g., teachers' comments), in addition to the usual artifacts.*

### **Teaching notes and/or activity**

At the end of the portfolio development exercise, a reflective statement is required. For this reflection, portfolio developers must cast their minds over the entire portfolio development process and work out what meaning the exercise held for them. The goal is to indicate how the portfolio developers have grown during the period--what areas were challenging for them--special features of the portfolio that hold special meaning for them, and so on.

*Therefore, it was evident that they were using the concepts to which they were exposed in the plenary. We were satisfied that participants saw the importance of the purpose, captions, and evidence which really make the portfolio unique and distinguish it from regular files or scrapbooks.*

*We also felt that we dealt well with the cohesiveness of the portfolio. This was emphasised in the assessment section when both analytic and holistic methods were addressed. Participants were able to see and value a well-articulated purpose and appropriate evidence.*

*These thoughts on the success of the workshop moved Margaret to interject some personal reflections:*

*Personally, I (Margaret) felt this was the best of my portfolio workshops. This group of participants worked well--they were motivated and simulated the classroom setting so well in developing their item sets. There was no doubt that they understood the concept of the portfolio--one participant made the comment that what they were producing in the schools for portfolios were not at all portfolios!*

*We felt that much of the success of the workshop could be attributed to the good blend of skills (organising, computing, etc.), knowledge (about alternative assessments, portfolios), and experience (with innovations, particularly the portfolio) which the three facilitators/presenters brought to the workshop.*

*This is not to say that in implementing the workshop everything was perfect. One of the challenges was getting the participants to work in mixed groups (that is, primary and secondary teachers, librarians, and so on). But once they were able to focus on the task that they played a major role in selecting, all the barriers came down because they were so immersed in the activities. We believe, then, that an important ingredient in the success of a workshop is the appropriateness and relevance of the activities.*

## PERSONAL VIEWS

**Margaret:**

### *A Different Road*

*Curricula that covered content based largely in a foreign context... the textbook as the source of all the 'correct' answers ...studying for examinations without time to reflect on the concepts I was learning ... memories of my early learning. My lifelong dream has been to be in charge of my own learning. When I developed my own portfolio, I had the opportunity for reflection and self-analysis that the portfolio development process facilitated. Now, my desire is to enable learners to have similar experiences in order to become more reflective in their learning, and engage in self-managed learning skills. This portfolio workshop provided me with the opportunity to enlighten participants in a meaningful way, about a different and empowering approach to teaching, learning, and assessing.*

**Anna-May:**

### *A Tree Blossoms*

*Participating in this exercise has helped me grow as an individual and as a teacher. For one, the way in which we handled the teaching of the elements of the portfolio, the simplification of the concepts, and the anchors for putting the portfolio together ensured that participants got a really good foundation to understand and use this strategy. Personally, I am getting better at conceiving and imparting teachable units that leave the learner better able to take control of learning. The use of the workshop strategy was another area of growth for me. I feel this is one reason why we did not take 'forever' to come up with a plan--we can use this strategy well. Perhaps the most important area of growth for me, though, was working as a team for the project and seeing it through to the production of the report. While working as a team was not a new experience for me, it is not usual to have experienced the level of collaboration and creativity exhibited by this group. I emerged from this experience with more expertise as a trainer, generally, and in teaching others about using the portfolio as a teaching/learning and assessment strategy, specifically. I also*

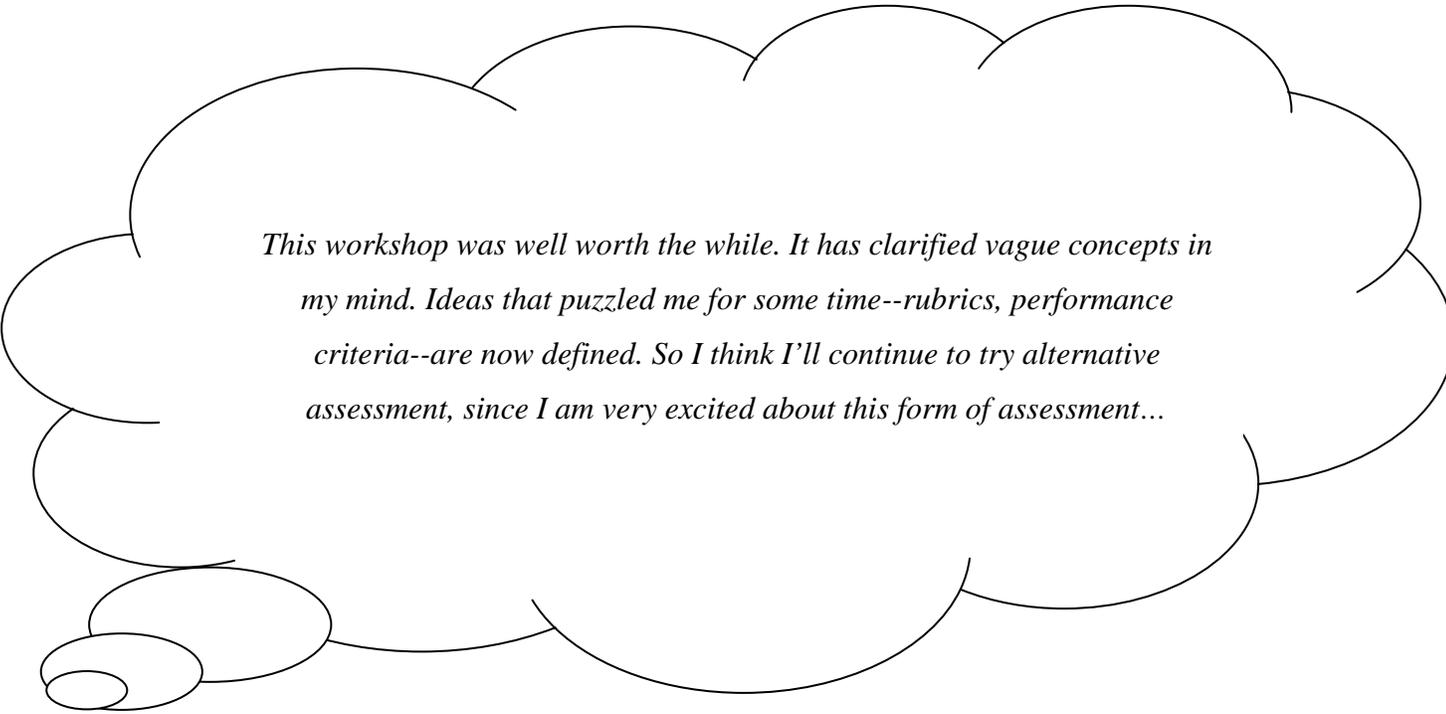
*emerged from the experience with the knowledge that we have available a team of experts on the teaching and use of the portfolio.*

**Joycelyn:**

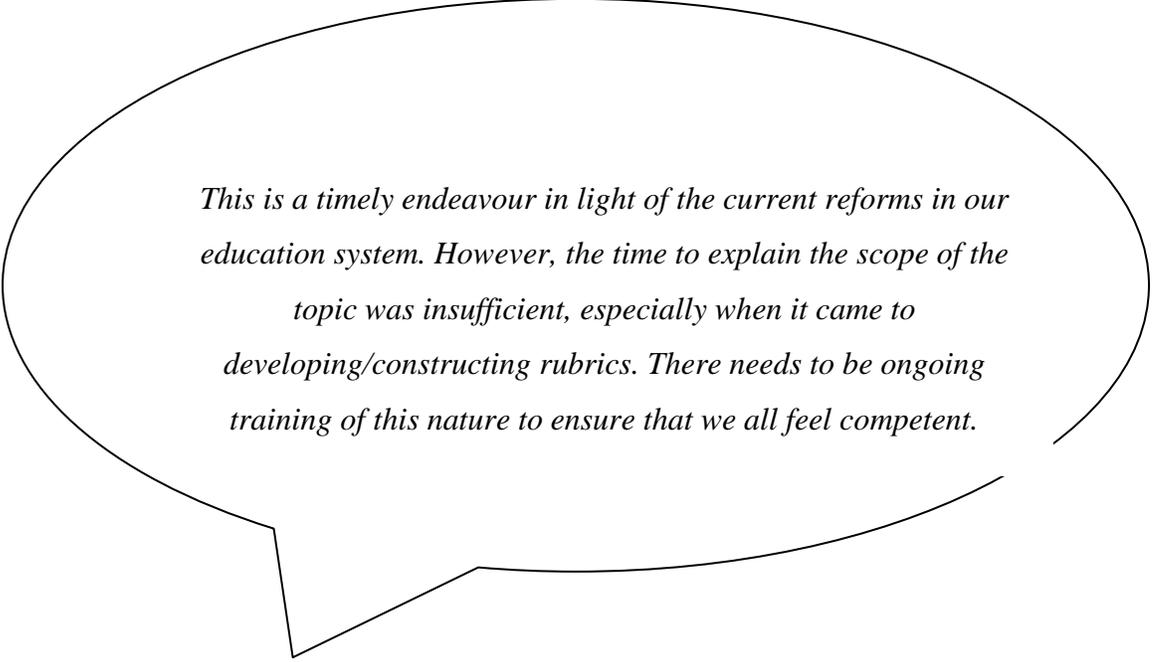
### ***The Theoretician Gets Practice***

*This exercise was a learning experience for me, and has contributed to my own growth and development in the area of portfolio development/assessment. Firstly, it brought home to me, in a very concrete way, the difference between content knowledge and pedagogical content knowledge--that is, knowing about portfolios on the one hand, and knowing how to teach about portfolios on the other. Secondly, it has allowed me to build on my professional expertise, and I am now thinking about ways to conduct other workshops on portfolios and other forms of alternative assessments. Thirdly, it has provided me with ideas that I intend to explore further with my own students in order to make the portfolio experience more meaningful for them. I have already taken steps to have them revisit their reflective habit, with a greater focus on the portfolio and its role in empowering them to become reflective practitioners. Finally, this exercise demonstrated the value of collaborative effort in achieving meaningful goals.*

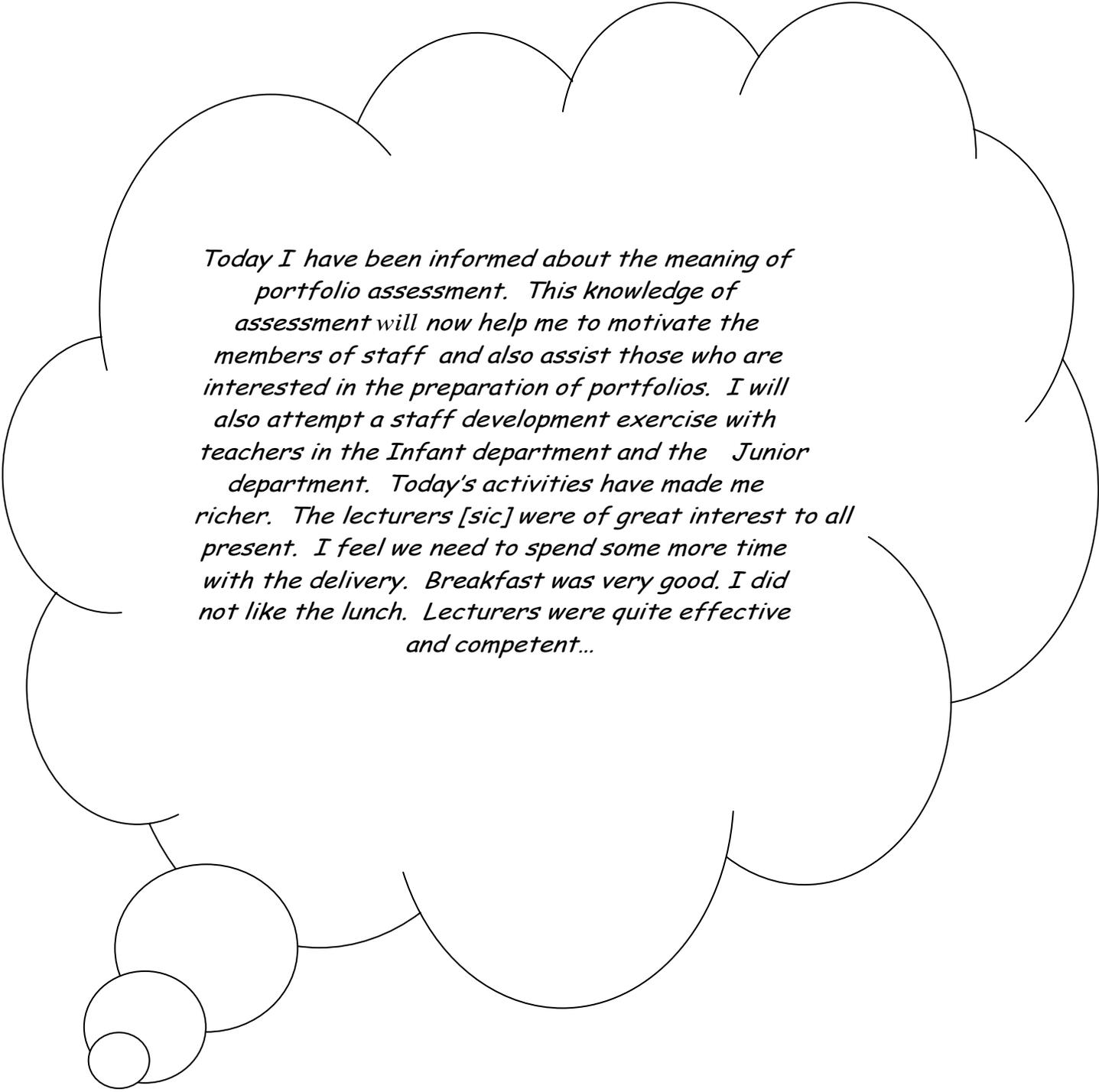
## PARTICIPANTS' REFLECTIONS



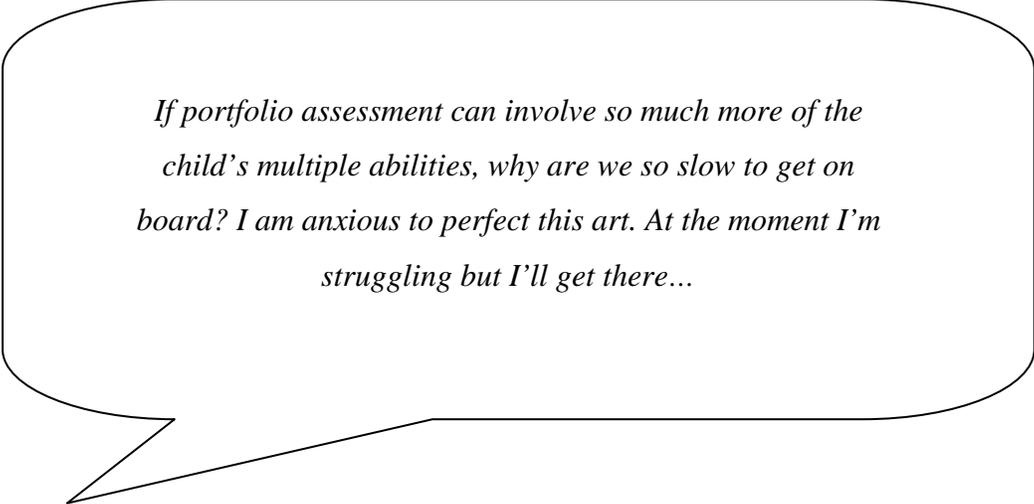
*This workshop was well worth the while. It has clarified vague concepts in my mind. Ideas that puzzled me for some time--rubrics, performance criteria--are now defined. So I think I'll continue to try alternative assessment, since I am very excited about this form of assessment...*



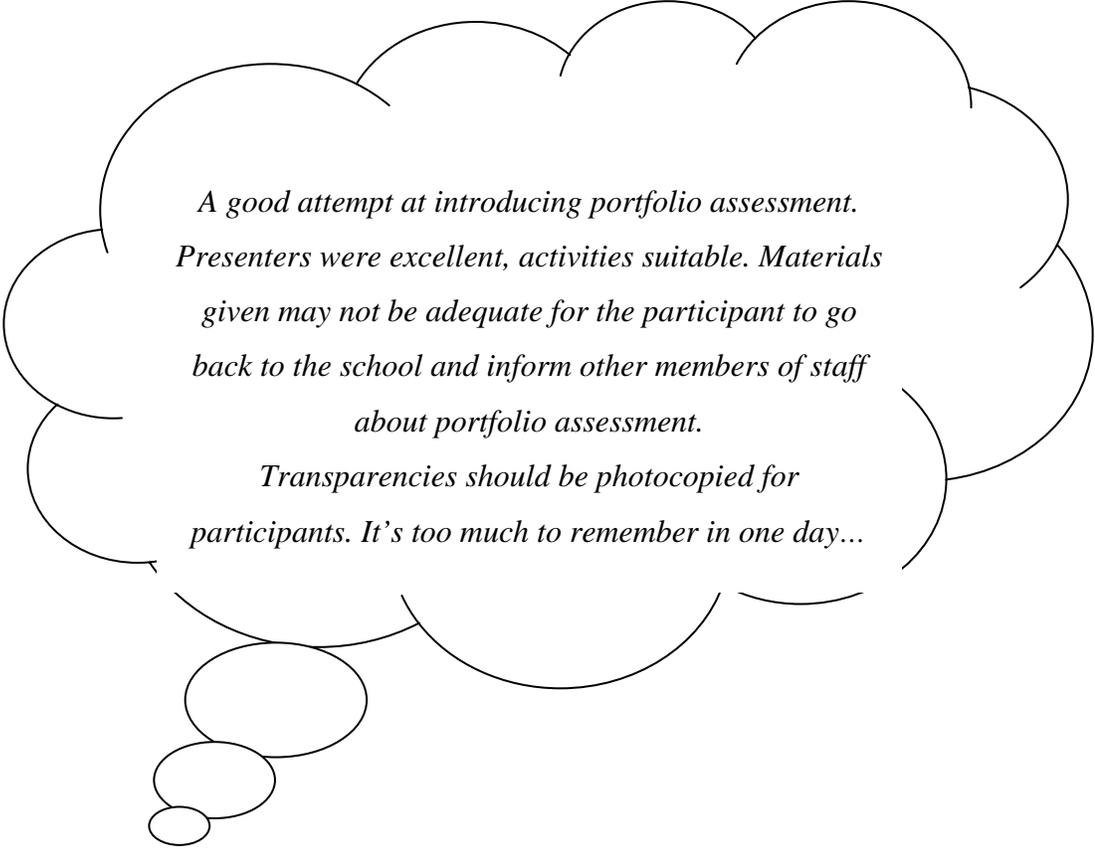
*This is a timely endeavour in light of the current reforms in our education system. However, the time to explain the scope of the topic was insufficient, especially when it came to developing/constructing rubrics. There needs to be ongoing training of this nature to ensure that we all feel competent.*



*Today I have been informed about the meaning of portfolio assessment. This knowledge of assessment will now help me to motivate the members of staff and also assist those who are interested in the preparation of portfolios. I will also attempt a staff development exercise with teachers in the Infant department and the Junior department. Today's activities have made me richer. The lecturers [sic] were of great interest to all present. I feel we need to spend some more time with the delivery. Breakfast was very good. I did not like the lunch. Lecturers were quite effective and competent...*



*If portfolio assessment can involve so much more of the child's multiple abilities, why are we so slow to get on board? I am anxious to perfect this art. At the moment I'm struggling but I'll get there...*



*A good attempt at introducing portfolio assessment. Presenters were excellent, activities suitable. Materials given may not be adequate for the participant to go back to the school and inform other members of staff about portfolio assessment. Transparencies should be photocopied for participants. It's too much to remember in one day...*



**SECTION 6**

**ATTESTATION**



## SECTION CONTENTS

- Introduction
- Attestation Caption
- Attestation



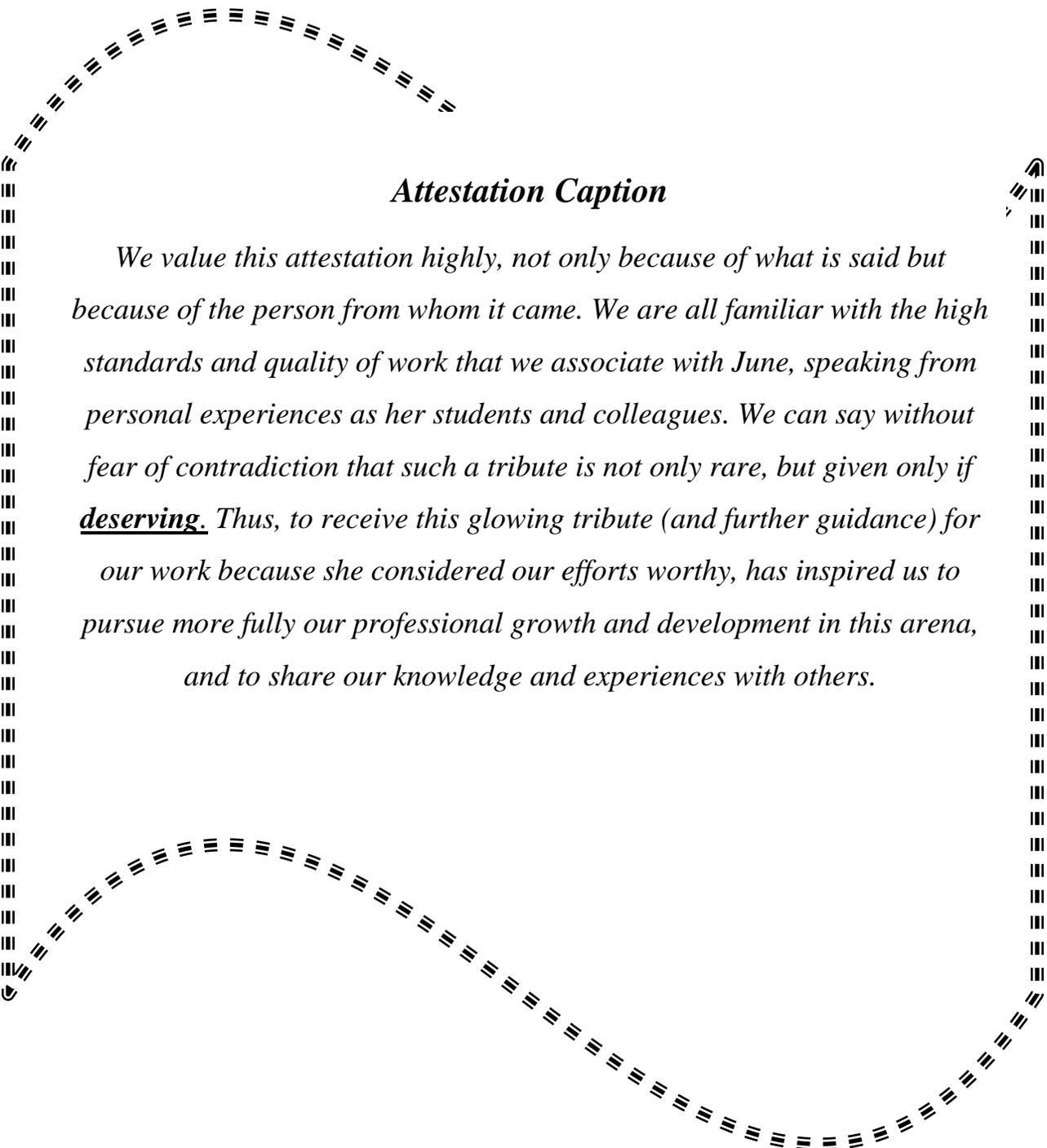
## Introduction

The attestation in this section was produced by Dr. June George, Research Fellow at the School of Education, Faculty of Humanities and Education, UWI.

We had submitted the first draft of the portfolio manual to her for comments, because of her expertise in measurement and evaluation, and her particular interest in alternative forms of assessment and their introduction into our education system.

### Teaching notes and/or activity

An **attestation** is evidence that is provided by some one other than the portfolio developer about the work/experience of the portfolio developer that is relevant to the portfolio's purpose. Therefore, attestations give an external, and perhaps objective, view about pertinent attributes of the portfolio developer.



### *Attestation Caption*

*We value this attestation highly, not only because of what is said but because of the person from whom it came. We are all familiar with the high standards and quality of work that we associate with June, speaking from personal experiences as her students and colleagues. We can say without fear of contradiction that such a tribute is not only rare, but given only if deserving. Thus, to receive this glowing tribute (and further guidance) for our work because she considered our efforts worthy, has inspired us to pursue more fully our professional growth and development in this arena, and to share our knowledge and experiences with others.*

January 26, 2001

Dear Joycelyn, Anna-May & Madge,

THIS IS GREAT! I am truly excited about what you have done for several reasons:

- your enhanced expertise
- your team work
- the decision to document what you did (so often we do not write anything down!)
- the documentation strategy you used--and so successfully!

You should not allow this to end here. Here are a few suggestions...

Hearty congratulations once again. Keep up the good work.

June



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## **APPENDICES**



## **APPENDIX A**

### **Organisations Participating in Workshop**

Arouca Government School

Arima Government Secondary School  
Bien Venue Presbyterian School

Brazil High School

Corinth Teachers' College  
Coryal High School

Curepe Vedic  
Eastern Girls' Government School  
El Dorado Senior Comprehensive School  
Five Rivers' Junior Secondary School  
La Veronica R.C. School  
Libraries Division, Ministry of Education  
Mafeking Government School  
Mt. Hope Junior Secondary School  
Mucurapo Girls' R.C. School

St. Benedict's R.C. School  
St. George East Education Division  
St. Joseph T. M. L.  
San Juan Boys' Government School  
San Juan Girls' Government School  
San Juan Government Secondary  
San Juan Presbyterian School  
Special Education Unit, Ministry of Education  
Tunapuna Girls' R.C. School  
UWI Distance Education Centre

## **APPENDIX B**

### **TTASCD Executive and Honorary Members (December 2000)**

DOYLE, JENNIFER  
CYRILLE, JENNY-LYNNE  
DANIEL, PAULA  
DICK, BERNADINE  
JACENT, WINSTON  
MUNGAL, KAMLA  
HERNANDEZ, DENISE

STANLEY-MARCANO, J. (HON)  
ROBERTSON, I. (HON)