

## Chapter 5

# PORTFOLIO DEVELOPMENT: THE STUDENT'S STORY

*“If we have a better understanding of where we are and what we are capable of doing, then we shall have a better sense of where we want to go, and can then begin to try to work out what we need to do to get there. Inside that kind of self-assessment, there is likely to be some sense of achievement. And a sense of having accomplished something already is the best motivation for wanting to attempt something else”* Evans (cited in Romaniuk & Snart, 2000, p. 29).

## INTRODUCTION

According to Mabry (cited in Gerber & Bezuidenhout, 2002) a portfolio is a collection of samples of best work selected by a student to provide a broad view of his or her achievements. The concept of portfolios is, however, not new. Portfolios have been used by a wide variety of professionals such as stock-brokers, architects, photographers, models, artists, advertising managers, graphic designers, nurses, teachers, publishers and sales managers to provide evidence of their work (Farr, 1991; King, 2000). Portfolios have also been used at elementary and secondary school level (King, 2000), while the use of portfolios in higher education has a history of more than 20 years (Fisher, cited in Baltimore, Hickson, George & Crutchfield, 1996). According to Moorcroft, Desmarais, Hogan and Berkowitz (2000) authentic assessments, such as by means of portfolios, have mostly been used in the classroom setting, but the use in informal settings such as in outdoor educational centres has been limited.

Extensive research in the use of portfolios has been conducted in the United States and in

Britain (van Niekerk, 1998). Recently, portfolios have also been used in a number of states in America to monitor the progress of students (Hoepfl, cited in Baltimore et al., 1996). In South Africa, portfolios are viewed as a possible tool for "... ongoing assessment and recognition of prior learning" by the government in its transformation of education (van Niekerk, 1998, p. 82).

Although comprehensive research has been conducted on the use of portfolios in the evaluation of teachers and teachers-in-training, the use of portfolios in the evaluation of master's level counsellors has been scarce (Carney, Cobia & Shannon, 1996). A movement towards alternative counsellor evaluation methods has, however, been noted by Carney and his team, although only a small percentage (7% of 74 master's level counselling programmes) were using portfolios or components thereof (Carney et al., 1996, p. 123). The assessment of career development by means of portfolios has, however, been noted by Lester and Perry (1995) as a new development in this field.

Moorcroft et al. (2000) argued that traditional standardised tests do not promote in-depth learning and emphasised that authentic assessments such as portfolios, allowed students to explore their understanding of a topic and their application of their knowledge. Authentic assessment tools, according to Moorcroft et al. (2000, p. 20) "... are student-centred, engaging and educational".

The focus of this study is to demonstrate how peer helper volunteers, who are rendering a volunteer service to the Unisa student population at higher education level as well as to community organisations, can use portfolios to monitor their development. Participation in the peer help programme allows peer helpers to gain experience. By reflecting on these experiences, peer helpers can identify critical career skills which can be recorded in their portfolios. Career portfolios can therefore be used, not only to showcase the skills that have been developed over time through participation in the peer help programme, but can also be used as a powerful tool to sell the applicant's transferable skills during an interview.

## WHAT IS A PORTFOLIO?

A variety of definitions of portfolios have been found in the literature consulted for this study. According to Paulson, Paulson and Meyer (cited in Lankes, 1995, p.1) a portfolio is "... a purposeful collection of student work that exhibits the student's efforts, progress, and achievements. The collection must include student participation in selecting contents, the criteria for selection, the criteria for judging merit, and evidence of student self-reflection". Paulson et al. (cited in Van Niekerk, 1998, p. 82) also stated that "[a] portfolio ... provides a complex and comprehensive view of student performance in context. It is a portfolio when the student is a participant in, rather than the object of assessment ... it provides a forum that encourages students to develop the abilities needed to become independent, self-directed learners".

A portfolio therefore:

- includes "... **biographies of works**" (Wolf, cited in Baltimore et al., 1996, p. 114) **consisting of work samples** that "... meet the need for accountability while recognizing and supporting individual progress" - thus focussing on the successes rather than on the failures of each student (Engel, cited in Grace, 1992, p.1).
- **is purposefully compiled to tell a specific story of achievements or growth**, in one or more areas, to both the student and/or to others (Arter, Spandel & Culham, 1995; Arter & Spandel, cited in Grace, 1992).
- **aims to demonstrate abilities, knowledge and skills**, and provides opportunities for reflection, for receiving feedback on one's work; and to evaluate the effectiveness of the interaction between facilitators and students (Doolittle, 1994).
- **enables students to assess their own work, document the quality of learning, monitor progress and reflect on development over time** (King, 2000; Meisel & Steele, cited in Grace, 1992; Moorcroft et al., 2000). Wolf (cited in Baltimore et al., 1996, p. 114) described the reflection activities as "... informed critic or

autobiographer, noticing what is characteristic, what has changed with time, or what still remains to be done”.

- provides evidence of “... **developmental leaps**”, “... **insights**”, and “... **examples of best practice**” (Baltimore et al., 1996, p. 114).
- **is not merely a resource file** (Farr, 1991) but consists of items that have been carefully and purposefully selected (Arter et al., 1995; Doolittle, 1994).
- **can be produced in a variety of media** such as “... special exhibits, photographic journals, electronic or digital portfolios, and video productions” with the specific aim of demonstrating an understanding of the concepts to be learnt (King, 2000, p. 151).
- **helps lecturers to learn how a student “... thinks, questions, analyzes, synthesizes, produces, creates”** and provides an overview of how students interact on an intellectual, emotional and social level with others (Grace, 1992, p.1); and helps to assess students learning and to evaluate how they have applied their knowledge (Gardner, cited in Ascher, 1990).
- **can be evaluated in terms of both the process of compiling a portfolio as well as the product, namely the portfolio itself** (Reeves, 2000) and is “... a means to an end, not an end in themselves” (Arter et al., 1995, p.3).
- “... **is an organizational tool**” that individuals can use to collate examples of best work and other information about themselves which will allow them to make “... personal, educational and career decisions” (Lester & Perry, 1995, p. 3). Through portfolio development, students learn that they should take responsibility for their own development and continue doing so as a lifelong process. According to Bailyn (cited in Lester & Perry, 1995, p. 3) students must become “career negotiators” in this life long process.

The key concepts of portfolios, according to van Niekerk (1998, p. 82), are therefore: “purposeful collection; student work; showing efforts, progress and achievement; participation; criteria for selection and judging merit; evidence of self-reflection; comprehensive view of

performance; a forum for independent, self-directed learners”.

## **THE PURPOSE OF PORTFOLIOS**

Arter et al. (1995, p.1) emphasised that portfolios “... are a means to an end and not an end in themselves”. It is not only the portfolio (the end product) that is important but what students learn by creating it. According to Arter et al. (1995) there are two basic objectives for using portfolios namely for instruction and for assessment purposes.

### **Instructional uses**

A number of instructional uses have been found in the literature consulted for this study namely:

- **Setting specific goals for achievement**

According to Arter et al. (1995, p. 1) one of the advantages of portfolios, in terms of instructional use, is that the process of creating a portfolio can enable a student to develop “... self-reflection, critical thinking, responsibility for learning, and content area skills and knowledge”. Arter et al. (1995), however, warned that this assumption is based on anecdotal evidence and not on “hard” facts (p. 1). The benefits of portfolios do not result automatically but have to be “... built into the portfolio system” itself (Arter et al., 1995, p. 1). Both students and facilitators should agree, right from the start, on what the objective of the portfolio will be. Specific criteria for evaluation should be determined and should be based on the range of performance found across specific levels of proficiency. Once criteria have been set, students can use these to revise and reflect on their work, and to set specific goals for growth and development. Students can then use the portfolio (1) as a presentation portfolio - to present

a selection of best work; (2) as a “process portfolio” - providing an overview of the evolution of a specific task; or (3) as a “growth portfolio” - showing how skills have developed or improved over time (p. 2).

- **Documenting incompetence or impairment**

The portfolio, according to Bradley and Post (cited in Baltimore et al., 1996) provides important information about not only a student’s strengths, which builds confidence, but also about his/her incompetence and weaknesses. Specific correctional interventions or remedial steps can then be taken to assist the student to improve his/her performance.

- **Facilitating the demonstration of basic counselling skills**

Measuring a student’s competency in a training programme can be a challenging task, but, according to Baltimore et al. (1996) it is particularly difficult to measure counselling skills in general. Baltimore et al. (1996) highlighted the example of master’s degree programmes in counselling, where the helping skills that students’ have developed often seem sufficient until the student needs to apply this knowledge in practice. Baltimore and his team suggested that portfolios contain multimedia such as video and audio tapes, which can be used to monitor the development of basic counselling skills (such as empathy, confrontation, listening and reflection skills) over time. According to Baltimore et al. (1996) skills development can be compared during the different stages of the training programme and such comparisons can provide proof of, not only the growth and development of the student, but also indicate the “... program’s progress towards excellence” (p. 116).

- **Forming the basis for constructive feedback**

According to Farr (1991, p. 1) portfolios can provide an overview of the skills and techniques

that students use. A portfolio that contains information that has been consistently collated over time will enable the facilitator to "... construct an organized, ongoing, and descriptive picture of the learning" (p. 1) that has taken place. The facilitator can then discuss his/her observations with the student which promotes collaborative team work between these two parties. The portfolio, therefore, provides a platform to discuss the student's performance and achievements (Baltimore et al., 1996). This process, furthermore, provides a feedback loop between the facilitator and the student which can also be used in adapting and redesigning processes as well as the training curriculum (Baltimore et al. 1996).

### **Assessment uses**

According to Arter et al. (1995) there are three common portfolio assessment purposes namely:

- to certify competency/mastery - indicating that a specific level has been mastered and that the student is ready to move to a higher level.
- to track growth - to indicate how skills have developed and attitudes have changed over time.
- for accountability - to demonstrate what has been learnt.

The purpose of portfolios within the Unisa Peer Help Volunteer Programme is both for **instructional uses** (to set specific goals for achievement such as to monitor self-directed activities and to promote taking responsibility for continued learning; to document weaknesses; to facilitate constructive feedback in terms of individual performance and programme management; and to share basic counselling experiences); and for **assessment uses** (to gain an overview of the story of the peer helper's growth and development by perusing selected items which will demonstrate the level that the peer helper is functioning at; and to provide examples of best practice to demonstrate what has been learnt). The focus of this study, however, is on how peer helpers use portfolios to monitor their growth and development that has taken place over a period of peer helper volunteering.

## TYPES OF PORTFOLIOS

According to Campbell, Cignetti, Melenyzer, Nettles and Wymann (cited in James & Greenwalt, 2001, p. 162) “[a] professional portfolio is a generic term that includes two types of portfolios: the *working portfolio* and the *presentation portfolio*”. The working portfolio is organised in such a manner that new items can be filed amongst the existing information as it becomes available. Examples of best work can then be selected and removed from the working portfolio to compile the presentation portfolio.

According to a number of researchers (Arter et al., 1995; Farr, 1991; Grosvenor, cited in Baltimore et al., 1996; Lankes, 1995) there are a variety of portfolio systems available namely:

- developmental or descriptive portfolios indicating individual progress and growth over time
- showcase portfolios to display and document best work produced
- college admission portfolios providing evidence of suitability for admission
- assessment portfolios to promote students’ self-assessment; and to plan and evaluate the curriculum and instruction
- selection portfolios to select students for specific programmes
- career portfolios to demonstrate specific skills and competencies to prospective employers
- evaluative portfolios - based on specific criteria.

Portfolios can also be used to (1) plan and facilitate teacher-student and teacher-parent conferences; (2) certify competence and proficiency such as for graduation eligibility; (3) grant credit such as for courses passed; and (4) build self-esteem and confidence. Baltimore et al. (1996) suggested that counsellors-in-training use a comprehensive combination of a showcase, a developmental and an evaluative portfolio.

The Unisa Peer Help Volunteer Programme has chosen the structure of a career portfolio as



peer helpers can ultimately use this tool to demonstrate their skills and competencies to prospective employers. This structure has, however, been adapted to include the essential elements of a showcase, developmental and an evaluative portfolio as this provides for a more comprehensive collection of achievements and overview of areas of growth, as the peer helpers prepare for the world of work. The structure of the career portfolio will therefore be discussed in detail.

### **Career portfolios**

Peer helpers in the Unisa Peer Help Volunteer Programme are trained and supervised to render a service to the Unisa student population as well as to grade 11 and 12 learners in schools and to other members in their communities. Through participation in peer help activities and projects, peer helpers gain experience and develop specific skills. The concept of portfolio development was introduced to the programme (see chapter 4 for details) to enable the peer helpers to reflect on experiences in order to identify the skills developed through this participation.

Peer helpers are senior students who are in the higher education phase of their career development, preparing for the world of work. The job market as they grew up to know it, has changed rapidly. According to Williams and Hall (2001) the job market has become extremely competitive, where a number of highly qualified individuals are vying for the same job. It is no longer sufficient just to have a degree or be able to broadly state that an individual has some skills. Employers are looking for evidence and proof of the claims that are made in CV's. As a result of this competition, applicants need to find new ways to prove their abilities in such a way that they stand out in an interview.

There has, therefore, been a shift in the world of work from "... employment security", where an individual would work for the same organisation for 40 years, to "... employability security" based on the individuals knowledge of his/her skills and expertise (Kanter, cited in Lester &

Perry, 1995, p.1). Employees need "... the knowledge that one has the competencies demanded in a global economy and the ability to expand and adjust those competencies as requirements change" Kanter (cited in Lester & Perry, 1995, p.1). Lankard (1996) echoed this statement and added that both "... global competition and new technologies" have changed the realities of the world of work. Lankard (1996, p. 1), therefore, advocated the development of a " ... new awareness of the self in relation to work".

The tool to develop this new 'awareness of self' is the career portfolio (Cawsey, Deszca & Mazerolle, 1995). The career portfolio enables an individual with "... a portfolio of skills" (p. 42) to offer these skills to clients based on the evidence of his/her competencies as depicted in his/her portfolio. According to Boes, VanZile-Tamsen and Jackson (2001, p. 230) the "... portfolio as an employment tool is a brief but powerful visual device to sell the applicant's abilities". Such a portfolio will contain examples of best work produced, which will be replaced as skills develop and improve. The goal with the portfolio is, furthermore, to present a picture of an individual's "... personal and professional growth" during an interview for a job, and to provide an overview of growth and development over time which has been compiled through regular reflection and self-assessment (Boes et al., 2001, p. 230).

Individuals should therefore view themselves as "... holders and developers of skills" (Cawsey et al., 1995, p. 43). According to Romaniuk and Snart (2000) employees are responsible to conduct self-directed activities in order to manage their career development. "To be able to do so effectively, one must know oneself in the sense of interests, preferences, strengths, weaknesses, temperament, values, and beliefs" (Moses, cited in Romaniuk & Snart, 2000, p. 30). Romaniuk and Snart (2000) therefore, view the establishment of identity as a competency that should be of primary importance to employees in the present work place.

Lankard (1996, p.3) found that various processes can be followed by individuals to broaden their self-knowledge namely:

... self-knowledge requires reflection on what was learned and what needs to be learned, the process by which learning occurred, and how that learning has enhanced what the student knows about him/herself in relation to work. Journal writing is a useful technique to stimulate reflections throughout the

learning process. Because reflection can provide valuable insights for their career development, students should be encouraged to allow time to reflect upon the activities in which they have been engaged and record their feelings, impressions, interests, and any new awareness they have acquired ... Whether through experiential, on-the-job, classroom, or community/service learning, students can enhance their awareness of themselves for their career development by continually summarizing and reflecting upon what they are learning as they continue their progression through school and work.

The shift in focus in the 'world of work' towards self-knowledge and skills development has prompted the project leaders in the Unisa Peer Help Volunteer Programme to introduce the concept of portfolio development into their programme. The structure of the career portfolio suggested for the peer helpers is based on the format advocated by Williams and Hall (2001, pp. 6 - 8) namely, (1) "statement of originality", certifying that the contents of the portfolio is the student's own work; (2) "work philosophy" indicating beliefs about self and the world of work; (3) "career goals" for the next two to five years; (4) "resumé" focussing on education and experience; (5) "skills area" focussing on transferable skills that have been developed; (6) "works in progress" citing work, activities and projects currently involved in; (7) "certificates, diplomas, degrees, or awards"; (8) "community service"; (9) "professional memberships and certifications"; (10) "academic plan of study"; (11) "faculty and employer biographies"; and (12) "references".

A career portfolio, according to Boes et al. (2001) is an effective career tool to use as it: highlights the abilities of the portfolio developer; creates a more personal atmosphere during

interviews which reduces stress; grasps the attention of the interviewer; enables the developer to include authentic samples which attest to his/her unique abilities, which may not be noticeable during an interview; enables the developer to influence the questions asked during the interview; provides "... better predictors of job success than peer assessments"; and offers "... a growth-oriented focus" which is a strong point in an interview (p. 229).

Peer helpers participating in the Unisa Peer Help Volunteer Programme are required to compile career portfolios based on their experiences and skills development. These career portfolios should highlight the peer helpers' abilities and skills and should assist them, as employment tools, during job application interviews when entering the job market. The focus of this study is to explore how peer helpers use their portfolios to monitor their development over a period of volunteer service.

## **CONTENT, ORGANISATION AND PRESENTATION OF PORTFOLIOS**

According to Moorcroft et al. (2000) the contents of a portfolio can be: (1) specified or suggestions can be provided; (2) should include samples or artifacts taken regularly; (3) should provide evidence of "... incremental progress" (p. 21) over time; and (4) should contain examples of a student's best work. From the literature consulted for this study it appeared that the content of portfolios can either be general or suggested for a specific purpose or a target group. As the focus of this study is on volunteers rendering a service as peer helpers who have been trained in basic helping skills, this section will focus on the general and counselling specific contents.

### **General content of a portfolio**

According to Grace (1992) the purpose of the portfolio should determine which items will be included. In general however, a powerful portfolio will consist of the following: work samples or artifacts documenting achievements; anecdotal records; self-reflection, self awareness and

self-assessment exercises; reflections on achievements; responses to direct and open-ended questions; checklists or inventories based on the learning outcomes and the documentation of skills; rating scales, self-evaluations and observations; surveys on study skills and habits; evaluations and feedback from lecturers and other parties; summaries and mind-maps; screening tests; interview results; action plans, goals and objectives; publications and presentations; rough and self-edited drafts, work-in-progress and final copies of work (Grace, 1992; van Niekerk, 1998).

### **Career specific portfolio content**

According to Baltimore et al. (1996) portfolios aimed at specific target groups such as counsellors and teachers will consist of specified items. The following examples can be included in a counsellor-in-training portfolio namely: (1) statement of goals and objectives, as well as a personal and/or work philosophy; (2) description of self-evaluation of achievement and process of improvement of performance; (3) examples of involvement in other counselling activities; (4) examples of papers and materials drafted, and reflection on feedback on assignments; (5) evidence of materials developed during training and practice such as training plans and research papers; (6) examples indicating synthesis of material; (7) evidence of group work conducted; (8) evidence of basic counselling skills (reproductions of actual counselling practice such as via video and audio tapes); (9) evidence of advanced skills development such as managing crisis; (10) evidence of specialised areas of interests; (11) evidence of feedback received from trainers and peers; (12) evidence of research related activities such as proposals and presentations; (13) evidence of professional participation in activities such as workshops and conferences; (14) evidence of reflections to highlight the thoughts and feelings behind decisions such as during self-evaluations, and examples of reflection notes on growth, development and progress); and (15) reflection on the portfolio process itself (Baltimore et al., 1996; Carney et al., 1996).

Carney et al. (1996) identified a different structure for the portfolio of counsellors-in-training

and suggested that it should be based on the specific domains and competencies which are stipulated for the profession, namely: (1) "Human Growth and Development"; (2) "Social and Cultural Foundations"; (3) "Helping Relationships"; (4) "Group Work"; (5) "Career and Lifestyle Development"; (6) "Appraisal"; (7) "Research and Programme Evaluation"; (8) "Professional Orientation"; and (9) "Clinical". Each domain requires specific components namely artifacts, reproduction and reflection which will highlight different aspects of the competency (pp. 130 - 132).

Boes et al. (2001, p. 232) suggested other categories for a 21<sup>st</sup> century school counsellor portfolio. These are: "leadership" - referring to all the activities related to the planning, coordination, presentation and the delivery of the programmes; "advocacy" - referring to effective social action competence; "teaming and collaboration" - referring to collaboration with others to improve student performance and success; "counselling and coordination" - referring to both individual and group counselling sessions, as well as other aspects related to the coordination of the programme; and "assessment-and-use-of-data" - relating to the "... identification of needs, removing barriers and securing resources to support the advocacy role" (p. 230).

### **Organisation of material**

The material selected for the portfolio can be organised in a variety of ways: (1) chronologically according to specific dates - thus providing an indication of how thinking has developed over time; (2) according to specific categories or themes; (3) according to specific categories of problems or concerns; and (4) a combination of these three structures or according to personal preference (Grace, 1992; van Niekerk, 1998).

Van Niekerk (1998) emphasised that no two portfolios are alike. Each portfolio "... is a unique picture of that person's learning, reflection and development" (p. 87). Portfolios should also contain a reference list and cite the sources of the material included in the portfolio (King,

2000).

### **Experiential learning and self-reflection**

According to Boud, Keogh and Walker (cited in O'Mara, Carpio, Mallette, Down & Brown, 2000, p. 129) "[r]eflection can be defined as an important human activity in which individuals recapture their experience, think about it, mull over it, and evaluate it". Reflective exercises can focus on a variety of aspects such as the description of "... responsibilities, strengths, and values" (Boes et al., 2001, p. 230).

Reflective comments are critical elements of the portfolio development process as it: (1) allows students to explore what the thinking behind their decisions and actions were; (2) can be used to describe and explain artifacts; and (3) provide information on what motivated students to include such artifacts (Boes et al., 2001; van Niekerk, 1998). Such critical reflection is an important part of the learning process and should become an "automatic activity" during the process of portfolio development (van Niekerk, 1998, p. 91).

Researchers such as King (2000) and van Niekerk (1998) suggested that students should develop a rationale for selecting specific items in the portfolio. The following questions can be asked to determine the **rationale for inclusion of items** namely: What motivated me to select this item for inclusion in the portfolio?; What is the value or the purpose of this learning experience?; Does this item indicate growth and if so in what way?; Which abilities and skills relate to this experience and which do I want to highlight?; Does this item link to my personal goals and objectives?; Does the item/s reflect my ability to integrate knowledge and apply it so that I can solve problems?; Does this portfolio reflect what I have learnt as well as my ability to communicate this clearly?

Students should also be encouraged to ask other questions to help them **formulate reflective statements** (King, 2000; Van Niekerk, 1998). Van Niekerk (1998, p. 91) provided a

comprehensive list of questions such as the following examples “What did I do?”; “What does this mean?”; “Why have I chosen this particular item to be included?”; “What have I learnt?”; “What have I not learnt?”; “What must I unlearn?”; “What is the value or purpose of that learning?”; “What insights have I had from this learning?”; and many more.

According to King (2000) students are not required to write long, drawn out paragraphs on each item included in the portfolio but should merely write a short summary stating the importance of that item and the meaning that it has for them. Deeper levels of reflection can be developed through what Gardner (cited in King, 2000, pp. 163 - 164) terms a “... processfolio” model. According to Gardner, portfolio development is more than just the collation of best items. The portfolio should also include items that would give an overview of the process of developing the portfolio such as “... initial plans, interim sketches, false starts, pivotal turning points, relevant objects from the domain that are liked and disliked, interim and final evaluations and plans for new and subsequent projects”.

Although the reflection process has definite learning benefits and can lead to insights, O’Mara et al. (2000) cautioned that reflection carried out during the portfolio process can evoke strong emotions. According to Atkins and Murphy (cited in O’Mara et al., 2000) the portfolio process and reflection can cause uneasiness as individuals can feel anxious about exposing themselves both in their written reflections, as well as during the evaluation process. Burke and VanKleef (cited in Romaniuk & Snart, 2000, p. 32), on the other hand, felt that to reflect holistically on all learning that has taken place allows students to develop an “... integrated identity”, which helps them to develop an “... internal reinforcement to boost confidence” and promotes “... adaptability” by motivating the individual for further learning.

The following statement by Baltimore et al. (1996) summarised the importance of on-going self-monitoring for continued professional development:

... the component of self-assessment included in the student portfolio process



encourages continued self-assessment once these students become professional counselors. This type of self-monitoring is essential to the continued growth and development of professional counsellors, as well as to the counseling profession (p. 119).

This is true for the continued growth and development of, not only the volunteers in the Unisa Peer Help Volunteer Programme, but also the project leaders.

### **Ethical considerations**

According to Carney et al. (1996) there are a number of ethical considerations that need to be borne in mind when portfolios are used for the purpose of training counsellors, namely that:

- the identity of the clients should at all times be protected, especially when items such as audio- and videotapes are included.
- counsellors-in-training should let themselves be guided by “[t]he principle of informed consent” (p. 126) in terms of the material and artifacts selected for inclusion in the portfolio.
- counsellors-in-training should inform the client about “...what materials would be used, how they would be used, who would have access to the materials and how client confidentiality would be protected” (p. 126).
- all information that could identify a client, should be omitted.
- videos should be recorded in such a way that the focus is on the counsellor-in-training rather than on the client. Actual video footage should be limited and the focus should rather be on “... role plays, treatment plans, or session plans of hypothetical clients or case assignments” (p. 126).
- counsellors-in-training should liaise with supervisors / project leaders to determine the suitability of the materials to be evaluated.

### **Medium of presentation of portfolios**

Portfolios have in the past, mostly been compiled in hard copy such as in folders or files. Williams and Hall (2001) provided a list of supplies that a student will require to start compiling a hard copy portfolio. Some of the items are namely: a tote box - to file examples of work before arranging the information in a file; 3-ring files or flip files to create a working and a presentation portfolio; high quality white and coloured paper; plastic sheet protectors; and extra wide paper dividers.

A more recent development is the use of technology as a medium for compiling portfolios (Fasick & McLaren, 1995). The benefits of electronic portfolios are that (1) copies can be forwarded to peers, parents and administration; (2) it takes up less space - a number of portfolios can be saved on one computer disk; and (3) it combines opportunities for self-directed learning with technological skills. Although electronic portfolios are a relatively new development, there are a variety of internet resources available providing information on how to develop and maintain digital portfolios. One such site can be found at <http://www.folioone.com/> (Reeves, 2000).

### STEPS IN DEVELOPING A PORTFOLIO

A number of researchers have identified specific steps to follow in developing a portfolio namely:

- **Determine the outline of the portfolio** by (1) drawing a schematic representation of the outline, the envisaged sections and the artifacts to be included in the portfolio; (2) discussing the process with peers, mentors or other specialists to get an idea of what the portfolio should contain; or (3) starting with what feels comfortable (Boes et al., 2001; Mill, 2001; van Niekerk, 1998).
- **Determine a developmental baseline** to compare growth and development over time. Baltimore et al. (1996) stated that their portfolio development process began with a screening interview after which an essay was written by the student. This essay

focussed on a number of issues such as career objectives, opinions about community counselling, descriptions of strengths and weaknesses, and the student's objective for participating in the programme. Those students who were accepted were given copies of their essays as the starting document in their portfolios - thus providing a baseline for monitoring personal development.

- **Identify a goal(s) for the portfolio** and then select items that would document these goals (Bird, cited in Carney et al., 1996; Martin, cited in James & Greenwalt, 2001).
- **Create and refine a personal and work philosophy** (Boes et al., 2001; Mill, 2001).
- **Develop a "... documenting and reflecting attitude"** so that it becomes a part of the approach during the portfolio development process (Boes et al., 2001, p. 230).
- **Develop a recording system** to allow you to date and label each entry in your portfolio. This is imperative for tracking development over time (Hanson & Gilkerson, 1999; Mill, 2001).
- **Create a document centre** where all materials and completed assignments can be kept until the final selection for the presentation portfolio is made (Boes et al., 2001). Campbell (cited in James & Greenwalt, 2001) distinguished between **a working portfolio and a presentation portfolio**. The **working portfolio** can serve as the document centre while the **presentation portfolio**, which is meticulously and professionally compiled, can serve to testify to skills and abilities during presentations.
- **Develop criteria for selecting specific items**. Carefully consider what goes into the portfolio as it should **contain carefully selected items** that provide evidence of expertise and achievements (Boes et al., 2001).
- **Include specific items** such as observations and reflections during training, supervision and service delivery; rough notes and mind-maps compiled during/after formal and informal training sessions; self-evaluations after interviews; feedback from trainers and subsequent evaluation of this feedback; action plans; individual research undertaken to assist clients; information on self directed searches; checklists and questionnaires; relevant new information found; notes on difficulties and successes;

proof of initiative and creativity; and evidence of creative problem solving and decision making (Mill, 2001; van Niekerk, 1998).

- **Add reflective narrative descriptions to each work sample and artifact, and include enough samples and artifacts to illustrate a specific skill and competency.** Make sure that the samples are representative of the skill or competency that should be highlighted (Hanson & Gilkerson, 1999).
- **Use a variety of “... methods, sources and contexts”** to generate samples (Hanson & Gilkerson, 1999, p. 86).
- **Ensure that the portfolio is “... brief, portable and professional”** (Boes et al., 2001, p. 230) and ask a mentor to review your portfolio before an interview or a presentation.
- **Refine and improve your portfolio after receiving feedback** as this is an important part of the portfolio development process (van Niekerk, 1998).

In the Unisa Peer Help Volunteer Programme, peer helpers-in-training are given opportunities to reflect on activities after each training session using the experiential learning cycle as a framework. Peer helpers are also required to write a pre- and post-narrative essay focussing on their motivations for participating in the peer help programme. This allows the peer helpers to develop a personal baseline in terms of knowledge, skills and self-confidence which can be compared with the situation at the end of the training, supervision and service delivery period.

### **THE ADVANTAGES OF PORTFOLIO DEVELOPMENT**

There are a number of benefits in using portfolios for authentic assessment (Arter et al., 1995; Baltimore et al., 1996; Carney et al., 1996; Grace, 1992; King, 2000; O'Mara et al., 2000; Tracy, Marino, Richo & Daly, 2000; van Niekerk, 1998).

**Table 12: Summary of the advantages of using portfolios**

Category	Examples
<b>Promotes experiential learning</b>	<p>The portfolio process:</p> <ul style="list-style-type: none"> <li>• provides the opportunity to reflect on experiences to determine what has been learnt</li> <li>• promotes learning through regular reflection on experiences, self-assessment exercises and self-directed activities.</li> <li>• develops the discipline of regular reflection which promotes the principle of life-long learning.</li> </ul>
<b>Increases motivation and commitment</b>	<p>The portfolio process:</p> <ul style="list-style-type: none"> <li>• enables students to become aware of their growth and development which motivates and encourages them to continue to take charge of their own learning.</li> <li>• monitors student's progress towards becoming more independent learners.</li> <li>• documents meaningful accomplishments.</li> <li>• assists students in attaching value to their own work.</li> <li>• results in a "... domino effect of improved student self-efficacy, persistence, and commitment to the goal of successful program completion" (Tracy et al., 2000, p. 245).</li> </ul>
<b>Showcases gifts and talents</b>	<p>The portfolio process:</p> <ul style="list-style-type: none"> <li>• tells the story of the student's development and achievements.</li> <li>• reveals individual talents and giftedness in different ways.</li> <li>• creates opportunities for students to include other evidence of learning which would not normally have been assessed.</li> <li>• can be used to demonstrate and provide proof of the development of counselling skills and abilities.</li> </ul>
<b>Increases self-knowledge</b>	<p>The portfolio process:</p> <ul style="list-style-type: none"> <li>• reveals students' personalities, interests, level of understanding, knowledge and "... metacognitive maturity" (King, 2000, p. 157).</li> <li>• reveals talents and gifts.</li> <li>• develops insight into personal strengths and weaknesses.</li> </ul>

<b>Improves meta-cognitive ability</b>	<p>The portfolio process:</p> <ul style="list-style-type: none"> <li>• develops students' "... thinking and analytical skills" through written reflections (King, 2000, p. 157).</li> <li>• assists in assessing students' thinking and writing processes.</li> <li>• "... demonstrate[s] their ability to work meaningfully with the concepts and content of learning material" (van Niekerk, 1998, p. 85).</li> <li>• develops students' ability to integrate new knowledge with existing knowledge.</li> <li>• allows students to take risks and to develop creativity and innovation.</li> <li>• enables students to "... learn about learning, as it facilitates learners' understanding of the relationship that exists between reading, writing and thinking" (van Niekerk, 1998, p. 85).</li> </ul>
<b>Promotes assessment</b>	<p>The portfolio process:</p> <ul style="list-style-type: none"> <li>• "... represent[s] a more genuine and authentic form of assessment because [it] measure[s] learning outcomes directly through demonstration and performance" (Baltimore et al., 1996, p. 113).</li> <li>• allows students to work in collaboration with lecturers and participate actively in the evaluation process.</li> <li>• "... offer[s] a solution to training problems often encountered by professional counselor programs" (Baltimore et al., 1996, p. 114).</li> <li>• provides evidence about the level of effectiveness of each student.</li> <li>• indicates which student's functioning is a concern and need improvement or correction.</li> </ul>
<b>Promotes the development of general and employability skills</b>	<p>The portfolio process:</p> <ul style="list-style-type: none"> <li>• develops "... reading, research, computer and internet skills" (King, 2000, p. 157).</li> <li>• develops self-critique and self-reflection skills.</li> <li>• helps students gain insight into their skills development which is critical to securing a position in the workplace.</li> </ul>

### **DIFFICULTIES AND DISADVANTAGES**

Various researchers (Brand, 1992; Doolittle, 1994; King, 2000; Lankes, 1995; Moorcroft et al., 2000; O'Mara et al., 2000 ) have listed a number of difficulties and disadvantages of portfolio development, namely:

**Table 13: Summary of difficulties and disadvantages of using portfolios**

Category	Examples
<b>Increases the workload</b>	<ul style="list-style-type: none"> <li>• It can be difficult and tiring to mark large numbers of portfolios.</li> <li>• Over-committed students can become over enthusiastic and submit a lot of information to assess.</li> <li>• The type of portfolio will determine the level of evaluation or scrutiny it receives. The level of scrutiny for a portfolio aimed at personnel decisions will be on a higher level than for the portfolio aimed at recording professional growth (Doolittle, 1994).</li> </ul>
<b>Can be costly</b>	<ul style="list-style-type: none"> <li>• It can be costly if portfolios are submitted and then have to be returned to students.</li> </ul>
<b>Can be time consuming</b>	<ul style="list-style-type: none"> <li>• The evaluation of portfolios can be time-consuming, requiring increased faculty reader time and leading to a longer turn-around-time.</li> <li>• Portfolios are time-consuming for both lecturers and students thus time-consuming to create, revise, administer, and score (Moorcroft et al., 2000).</li> <li>• It is time-consuming to implement changes to a programme as a result of the feedback obtained from portfolios (Moorcroft et al., 2000).</li> </ul>
<b>Storage space can become a problem</b>	<ul style="list-style-type: none"> <li>• Portfolios require more space for storage and management of material. Electronic portfolios, of which a number of commercial packages are available on the market, are a solution to this problem. Electronic portfolios enable students to update their information regularly and replace the information with other work samples to compile a portfolio of authentic evidence of accomplishments (Lankes, 1995).</li> </ul>
<b>Assessment of portfolios can be problematic</b>	<ul style="list-style-type: none"> <li>• Clear guidelines and criteria for assessment should be developed before portfolios are implemented.</li> <li>• Lack of standardisation in evaluating portfolios is a concern. This can be overcome by requiring that the portfolio contains certain mandatory items (Doolittle, 1994).</li> <li>• Subjectivity in the evaluation process is also problematic. According to Doolittle (1994, p. 3) the use of a "... Likert-type evaluation form, of predetermined qualities, based on the mandated items", is often the solution. Questions asked during the evaluation are then grouped according to the predetermined categories in the evaluation form, and are then rated accordingly.</li> </ul>

<p><b>Student reactions can vary</b></p>	<ul style="list-style-type: none"> <li>• Initial reaction of students can be negative, namely some students: <ul style="list-style-type: none"> <li>S lack the motivation to compile a portfolio</li> <li>S do not take the process seriously</li> <li>S are uncertain about what is expected of them</li> <li>S are anxious about sharing their innermost thoughts and feelings with others</li> <li>S feel vulnerable in visually presenting their development</li> <li>S procrastinate in getting started which can result in a rushed task in the end.</li> <li>S underestimate the task with the result that the product is compiled in a haphazard manner with little or no reflection (O'Mara et al., 2000).</li> </ul> </li> <li>• Over-committed students can overproduce and submit a lot of information to assess. "Encouraging students to be more manageable without discouraging their enthusiasm, which can result in underproduction, is a challenge" (King, 2000, pp. 157 - 158).</li> </ul>
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Although a number of disadvantages of portfolios have been listed, Carney et al. (1996, p. 127) felt that the benefits outweighed the difficulties or limitations.

## **EVALUATION OF PORTFOLIOS**

According to Grace (1992) portfolio evaluation is a process where current achievement or performance is compared to earlier work. This process should indicate the progress that has taken place and the growth towards a specific set standard, which should be in line with a specific curriculum and the "... developmental expectations" (p.2) of the supervisor or facilitator. Grace (1992) emphasised that the portfolio should not be used to compare one individual with another, but to document individual progress and growth over time.

### **Types of evaluation**

Hult (1993) distinguished between formative and summative evaluation of portfolios:

- Formative evaluation refers to evaluation "... that takes place during the developmental



(formative) stages of a programme or a product” (Scriven, cited in the American Educators’ Encyclopedia, cited in Hult, 1993, p. 59). Information that is generated through this evaluation is used to (1) adapt programmes; (2) amend materials; (3) adapt the design of a programme; and (4) rethink goals and objectives. Formative evaluations provide students with an opportunity to improve on performance - thus getting a second chance.

- Summative evaluation, on the other hand, refers to “... the assessment of the overall effectiveness of a program or a product” (Scriven, cited in the American Educators’ Encyclopedia, cited in Hult, 1993, p. 59).

Hult (1993) cautioned that formative evaluation is often not separated from summative evaluation in portfolio assessment. This leads to the use of the two goals namely of “... accountability and improvement” (p.60) to be used interchangeably. According to Hult (1993) both formative and summative evaluation can be used in the evaluation of portfolios but are applied at different stages of the portfolio process.

### **Criteria for portfolio evaluation**

A number of examples of criteria for evaluating portfolios have been found in the literature consulted for this study. The rating scale used by King (2000, p. 159) added up to 100 points and provided broad categories of criteria to be used for evaluation:

- **Presentation style (20 points)**

This includes the evaluation of the format of the portfolio and how the material has been organised (10 points). Marks (5 points) are given for a table of contents and the balance of 5 points are allocated for artifacts and items that are neatly typed out and presented to the evaluators.

- **Written analysis, examples and evidence of learning (40 points)**

Twenty (20) marks are given for narrative statements about the items included, for

reflections indicating why the items were included and what was learnt through the process. The balance of 20 points are allocated if the portfolio provides definite proof of the learning that has taken place.

- **Extent of coverage (30 points)**

Twenty (20) points are allocated if the breadth and diversity of the items indicate how understanding has been expanded, and a further 10 points are allocated for information provided according to the "... required areas of coverage for exam or final project" (p. 159).

- **"References (10 points)" (p.159)**

Five (5) points are allocated if the sources are listed throughout the portfolio; and a further two and a half points are allocated for the citing of all web addresses. The final two and a half points are assigned if a reference page is provided at the end of the portfolio.

Van Niekerk (1998) also provided a comprehensive example of a matrix indicating, in detail, how learning outcomes should be stipulated, how the criteria for evaluation should be defined, how examples of the evidence should be described and finally, how each of these should be evaluated against a six point rating scale ranging from very high, to not shown. Van Niekerk (1998, p. 99) proposed that the learning outcomes should first be determined in the first column (eg. "assume responsibility for his/her learning"); in the second column the criteria for evaluation should be defined (eg. "demonstrate his/her willingness to assume responsibility for his/her learning"); in the third column the evidence that the evaluator will be looking for is described (eg. "By including items which indicate the student's willingness to do more than what is expected, to read wider, etc"). The outcomes for each course should therefore be defined and the criteria and the evidence should be described. Once this has been done, each outcome, based on its criteria and evidence should be rated according to a six point scale ranging from very high, high, medium, low, very low to not shown.

The portfolios of peer helpers in the Unisa Peer Help Volunteer Programme are evaluated

according to the following criteria:

- **Portfolio presentation**

This includes aspects focussing on the general organisation of the portfolio; the way in which the portfolio has been compiled (with care, neatness, creativity and attractiveness); and the amount of effort that has gone into the preparation of the presentation to the panel of evaluators.

- **The structure of the portfolio**

The structure is based on that of a career portfolio which is suggested by Williams and Hall (2001). The overall progress with regard to the development of the career portfolio is evaluated.

- **Self-directed learning activities**

The evaluation focusses on whether the portfolio provides evidence of self-directed and reflective learning and whether the portfolio provides evidence of significant learning (such as insight developed as a result of reflection). This includes the narrative essay that is written just after the core training and again after a period of six months service delivery. The focus of the narrative essay is to reflect on the reasons why a student applied to become a peer helper; the helping service that has been rendered in the past; whom have been guided, counselled or helped; and where this helping has taken place.

- **Skills development**

Skills development is also evaluated with regard to whether verifiable proof can be provided for claims made in this regard.

The process of peer help portfolio evaluation at Unisa is adapted from the work of Martin-Kniep (1998) but is still in a developing phase and the structure presented above is in a process of refinement.

### **Practical hints and tips on portfolio evaluation**

- Students should be informed about a number of aspects involving the portfolio evaluation process namely (1) information about the process itself, (2) the evaluation criteria, and (3) how the total evaluation will be used. Carney et al. (1996, p. 126) cited The American Counseling Association's Code of Ethics which stipulated that students must be informed in advance about "... the level of competency expected, appraisal methods, and timing of evaluations".
- The portfolio should be evaluated holistically - viewing the product as a whole together with a number of specific criteria (Haertel, cited in Carney et al., 1996).
- The reliability of the evaluation process can be increased by using a variety of portfolio evaluators (Carney et al., 1996).
- On-going portfolio assessment is facilitated by regular individual meetings between a faculty member and a student, where the portfolio is discussed and where the contents are analysed. Remedial actions can be discussed and suggestions can be made. The student's progress can be monitored closely during these meetings (Baltimore et al., 1996).
- Written comments from the supervisor/evaluator, which are based on the strengths and weaknesses of each student's portfolio, form the final step of the evaluation process (King, 2000).
- Students can also be requested to complete questionnaires at the end of their undergraduate study. Baltimore et al. (1996, p. 118) used two questionnaires namely (1) "Reflection on portfolio evaluation", and (2) "Attitude toward portfolio evaluation". The information gleaned from these questionnaires can assist supervisors in improving their portfolio evaluation process.

To summarise, Moorcroft et al. (2000, p. 24) described portfolio assessment as "... a difficult, yet challenging and exciting process". According to these researchers, the process of evaluation became easier with each evaluation that they conducted. Moorcroft et al. (2000) also felt that the time and effort that they have put into the process has been beneficial as they could observe a number of benefits namely an increase in student knowledge and the development

in students' ability to apply the skills that they have learnt. The process also enabled them to identify areas in their training programme that needed to be adapted. "We also have discovered that our preconceptions of what students would learn and what they actually did learn were at times vastly different".

### **STEPS IN IMPLEMENTING A PORTFOLIO PROGRAMME**

Doolittle (1994) and Carney et al. (1996) have identified a number of steps in implementing a portfolio programme namely:

- Get acceptance for the use of portfolios from all stakeholders to ensure that the effort that will be put into the process will ensure success in the end.
- Establish ownership right from the start. All stakeholders should be involved from the inception through to the development of the programme. Facilitators " ... must feel ownership over the program's direction and use" (Doolittle, 1994, p. 3).
- Implementation should be communicated and stakeholders should know how the portfolios will be used. The evaluation structure and scoring methods should be clearly spelt out.
- Ethical considerations, as discussed previously, should be borne in mind.
- Previously developed portfolio models can be used and should be adapted to suit specific programmes.
- "Be realistic. Portfolios are only one form of authentic assessment" (Doolittle, 1994, p.3) and should be used in conjunction with other forms of evaluation.
- Start off slowly as it takes time to establish portfolio evaluation. Doolittle suggested "... one to two years for development, implementation and regulation of a portfolio programme" (p. 3).

### **CONCLUSION**

The concept of portfolio development is not new. It has been used by a number of professionals

to provide evidence of their work. Despite the fact that there are a number of purposes for portfolio development, different types of portfolios, different mediums in which to present portfolios, a variety of ways in compiling and organising portfolios, many advantages and disadvantages and methods of evaluation, portfolios are compiled to tell a story of the compiler's growth, development and achievements. Portfolios can be used to document growth and progress over time and can be a powerful tool to be used by individuals for performance appraisal, job or promotion interviews and to showcase individual growth.

Portfolios, in this study, are used by peer helpers to monitor their development specifically related to the acquisition of skills for career development purposes. Schmid (cited in Tarnowski, Knutson, Gleason, Gleason & Songer, 1998, p.17) summarised the purposes of such an undergraduate portfolio as follows:

Assembling an undergraduate portfolio is a great way to help students focus on the future. The portfolio serves as a constant reminder that what counts is what you can demonstrate. It is an important antidote to the notion that taking courses is enough. Students who begin assembling a portfolio immediately realize that many of their most important experiences and skills have been gained outside of university classrooms. The portfolio also helps them take personal responsibility for shaping their future professional profile.