

Stage 1 – Determining the portfolio context and goals

In this first stage of the electronic portfolio development process, the primary tasks are: Identify the assessment context, including the **purpose** of the portfolio. Identify the goals to be addressed in the portfolio; these should follow from university standards for promotion and tenure and from standards set by relevant professional associations. This important step sets the assessment context and helps frame the rest of the portfolio development process. Knowing the primary **audience** for the portfolio will help decide the format and storage of the formal or presentation portfolio.

Before making any decisions about the development software, identify the **resources** available for electronic portfolio development. What hardware and software do you have? What technology skills do you have or want to develop? Here are some specific questions to answer from the EPPlanningWorksheet for this stage:

Assessment Context

What is the purpose of the portfolio?

- Show growth over time
- Document ongoing learning and professional development
- Assessment – achievement of standards or goals
- Employment (Marketing)
- Other: _____

What learner outcome goals will the portfolio demonstrate (or which national, state, or local standards and their associated evaluation rubrics or observable behaviors)?

Resources available for electronic portfolio development

What hardware and software do you have and how often do you (or students) have access?

Table 3: Technology Required				
1	2	3	4	5
No computer	Single computer with 64 MB RAM, 1GB HD, no AV input/output	One or two computers with 128 MB RAM, 4+ GB HD, simple AV input (such as QuickCam)	Three or four computers, one of which has 256+ MB RAM, 20+GB HD, AV input and output, scanner, VCR, video camera, high-density floppy (such as a Zip drive)	Level 4 and CD-ROM recorder, at least two computers with 512+ MB RAM; digital video editing hardware and software. Extra Gb+ storage (such as Jaz drive)

What are the technology skills of the students and teachers?

Table 2: Technology Skills

1	2	3	4	5
Limited experience with desktop computers but able to use mouse and menus and run simple programs	Level 1 and proficient with a word processor, basic e-mail, and Internet browsing; can enter data into a predesigned database	Level 2 and able to build a simple hypertext (nonlinear) document with links using a hypermedia program such as HyperStudio or Adobe Acrobat Exchange or an HTML WYSIWYG editor	Level 3 and able to record sounds, scan images, output computer screens to a VCR, and design an original database	Level 4 and multimedia programming or HTML authoring; can also create QuickTime movies live or from tape; able to program a relational database

Who are the various audiences for the portfolio?

- Student
- Parent
- College
- Faculty
- Potential employer

The primary audience for the portfolio will contribute to the decisions made about the format and storage of the final or presentation portfolio. Choose a format that the audience will most likely have access to; i.e., parents may not have a home computer, but may have a VCR.

What kind of technology does the primary audience have access to?

0	1	2	3	4	5	6
VCR	Floppy Diskette Hard Disk Drive	Zip Disk/ Super Disk Jaz Disk	LAN Server	CD-R/W	WWW Server	DVD Player

What common software tools do you have that you can use to create the following type of electronic portfolio?

0	1	2	3	4	5
All documents are stored in paper format. Some portfolio data may be stored on video tape.	All documents stored in digital file formats, using word processing or other commonly-used software, and stored in electronic folders on a hard drive, floppy diskette or LAN server.	Portfolio data is entered into a structured format, such as a database or HyperStudio template or slide show (PowerPoint or AppleWorks) and stored on a hard drive, Zip, floppy diskette or LAN server.	Documents are translated into Portable Document Format (Adobe Acrobat) with "hyper-links" between standards, artifacts, and reflections using Adobe Acrobat Exchange and stored on a hard drive, Zip, Jaz, CD-R/W, or LAN server.	Documents are translated into HTML, complete with "hyper-links" between standards, artifacts, and reflections, using a web authoring program and posted to a WWW server.	Portfolio is organized with a multimedia authoring program, incorporating digital sound and video is converted to digital format and pressed to CD-R/W or posted to WWW in streaming format.

Levels of Digital Portfolio Software Strategies based on Ease of Use

Do you want to aggregate assessment data (for reports on student achievement of standards)?

How much are you able to spend (or charge) **per** student **per** year on an e-portfolio system (in addition to currently-available hardware/software):

0	1	2	3	4	5
\$0	\$5	\$12	\$40	\$75	\$100

You will know you are ready for the next stage when:

You have identified the purpose and primary audience for your portfolio.

You have identified the standards or goals that you will be using to organize your portfolio.

You have selected the development software you will be using and have completed the first stage using that tool.

If you haven't done so already, read the section on selecting software.

