Guidelines for ePortfolios in Higher Education

What to consider when getting involved

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Introduction

ePortfolios can be an answer to changing needs in today’s higher education. Young people are expected to show more than just a degree by the end of their studies, they must be able to cope with worldwide competition.
If they decide to use an ePortfolio, either their own or one hosted by their institution or employer, it will help them build and communicate their personal profile and show what they can do. It will also help them identify their strengths and weaknesses and find out what they need to do to keep their knowledge up-to-date.
Students and teachers, institutions, colleagues at work, etc. might find that their ePortfolios can also be useful for teamwork and other co-operations, e.g. for working on common papers or projects, building sites, giving feedback, etc.
Depending on the actual situation, the focus of ePortfolios might be on current learning and skills, on achievements, or on future goals.

How can the benefits of ePortfolios be reached? Although there is abundant literature on ePortfolios, it can be difficult to understand the scope of conditions, changes and consequences to be expected when ePortfolios are introduced to (higher) education. The aim of these guidelines is therefore to give an overview of what all parties involved need to know to determine their course of action and successfully enter the ePortfolio process. The focus is on the general idea and typical uses of an ePortfolio; it will be up to each person or institution to interpret and adapt the guidelines to their own individual needs.

This introduction starts by describing the typical features of an ePortfolio and will be followed by chapters specifically addressing students, teachers, institutions, and IT departments. To avoid redundant information, the individual chapters build on information given in preceding chapters and will concentrate mainly on the additional aspects which are important for the stakeholder addressed in the specific chapter. We therefore recommend that you read the guidelines from the beginning until you reach the chapter concerning your role and responsibility.

a) Core Ideas

An ePortfolio is a space used by individuals (students, teachers, institutions, etc.) to collect, deposit and arrange whatever concerns them, a space to work, reflect, document, share and discuss. These activities help

- to develop a profile and identity
- to have an overview of one’s studies, research and areas of competencies
- to organize and regulate learning and teaching
- to gain a clear idea about strengths and weaknesses
- to develop strategies and achieve goals
- focus on achievements
to train self-awareness and self-responsibility
● to coordinate projects
● to assess and advise peers, students, teachers, institutions, etc.

Here, the term “individuals” refers to students, alumni, teachers and institutions. Every individual is the owner of his/her own ePortfolio. Therefore, the individuals decide which parts of their ePortfolios they want to show or share with other people, and in which way they wish to benefit for their own lifelong learning and personal development.

b) Core Features

● Independent of whom hosts the ePortfolio, it is owned and controlled by the individual using it.
● It enables the collection of information that can be represented in various formats (pdf, word, audio, video, etc.).
● It allows for differentiated sharing and visibility according to the needs of the owner.
● It allows for shared use, e.g. cooperative work, feedback, etc.
● It has no expiry-date and can be taken along when leaving university or changing jobs.

c) Various uses

An ePortfolio offers more possibilities than a paper ePortfolio when collecting artefacts, composing documents, collaborating, etc., and can be used for various purposes, depending on the individual’s interests and perspective (see chapter 1.1, above). Accordingly, the ePortfolio can have several functions such as showcase ePortfolio, learning ePortfolio, presentation ePortfolio, etc., depending on actual needs and focus:

● Personal development planning (focus on future)
● Lifelong learning (focus on current learning and skills, including past experiences and future plans)
● Personal identity (focus on achievements)

d) Players

Students who use an ePortfolio have the possibility of managing their learning process more independently. They also have the possibility of using their ePortfolio outside courses, e.g. for managing their personal development. Preferably they will learn to use it adequately under the guidance of teachers or tutors.

Teachers who decide to use ePortfolios monitor the work-process, advise their students and inform about expectations and terms of use (student responsibility, assessments, etc.). They continually follow the individual development of their students. This process and the use of one’s own ePortfolio leads to more focus on the quality of teaching and personal satisfaction.
The institutions who believe that both the institution itself as well as the teachers and students will benefit from ePortfolios, decide on introducing institutional ePortfolios, on rules of action, and necessary support.

**IT department**: a well-planned technical implementation is crucial for the success of ePortfolios. For this reason and because of the large scope of this type of project, it is strongly recommended to establish a directory board for the project.

**Alumni, Career services and Employers** are further players on the periphery of educational institutions, with an interest in ePortfolios.

e) **Netiquette**
Remember the following points:
- Plagiarism (e.g. copying from peers, scientific citation)
- Copyright (e.g. when showing documents on the web vs. showing them privately)
- How to behave in the internet (tone, criticism, privacy, etc.)
1.1 Get going

An ePortfolio is offered to you by your institution. It is like a box you can collect things in. You have a link to access your ePortfolio and people at your institution will introduce you to its use and answer your questions. You own your ePortfolio, so make sure you understand it!

You are taking courses, learning, being assessed, making experiences.
You have occupations, ideas, projects.
Collect what you are doing in your ePortfolio, for instance documents, pictures and links related to your activities.

Look at your collection, think about what it means to you, what you would like to do next. Note and add them to your ePortfolio. This is the reflective part of your ePortfolio.
One of the most important things about your progress.

You might want to show some of your things to someone else. Put them in a separate box and give whoever it concerns access to this box. Or make a document with those things and send it to your teachers, colleagues, future employers, etc.
1.2 Continual development

Your ePortfolio is under continual development. The process is often cyclic:

Learning

Learning means that you are building on and integrating past, present and future experiences, assessments, knowledge, etc.

Collecting artefacts

While you are working on a project, you will document what you are doing by saving, working on and commenting artefacts that you have searched for or produced. During this process, you can find guidance in communication with peers and tutors, or in informative documents on the subjects of learning, judging your work, etc.

Several formats are available: word, pdf, audio, video, etc., and you can connect your ePortfolio with other facilities like knowledge-management tool, social platform, forum, collaborative worksite, etc.

Personalising, reflecting, communicating

Sometimes you will extract, arrange or organize parts of your ePortfolio, for instance papers or other data, for assessment and other purposes. You may want to plan future projects, to document your achievements for job-applications, grants, etc., or work together with your peers. Depending on what your professor, your counsellor or your employer expects, you will decide on what you want to present and how you will comment your presentation. An important part of using your ePortfolio is to reflect regularly on what you have done and what you want to do next. You may want to use a template or write a blog, reflect daily or monthly, get feedback from peers or mentors, etc. To get started, some advice on how to reflect will be of advantage. See also chapter 8.1

Starting a new project
New ideas and new projects will benefit from your previous ePortfolio-cycles, because the ePortfolio-cycles make you think about your work, show you what you have achieved, and inspire you for further activities.
1.3 Examples: Some moments in two students’ lives

<table>
<thead>
<tr>
<th>High-School</th>
<th>Early experiences, before university</th>
</tr>
</thead>
<tbody>
<tr>
<td>Anne has a language portfolio at high-school. Her teachers tell her how to use it.</td>
<td>Robert is familiar with platforms, blogs, and several other media used in school, but not ePortfolio. He is the webmaster of his club.</td>
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<tr>
<td>Abroad</td>
<td>Starting to study</td>
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<tr>
<td>In her year abroad, she also entered certificates from a language school, a tango school, and voluntary work.</td>
<td>When he starts studying, he has to use two different learning managing systems and soon also an ePortfolio.</td>
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<tr>
<td>University</td>
<td>Assessment</td>
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<tr>
<td>Anne starts studying. She finds out that her university offers an ePortfolio-functionality and decides to fill in all her certificates and papers into her new ePortfolio.</td>
<td>To pass a course in scientific writing, he has to write several texts, collect them in his ePortfolio and reflect on his progress in scientific writing. For the assessment, he has to choose one text that he finds important and explain why. He gives his lecturer access to the part of his ePortfolio where he has collected his texts and presented the chosen text and reflection.</td>
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<tr>
<td>Course-blog</td>
<td>Reflection and feedback</td>
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<td>In a course, Anne is asked to write a weekly blog about the sessions, together with four other students. Their blog-entries also contain questions which are answered by fellow-students, the tutor or professor.</td>
<td>After a couple of semesters, Robert is used to reflecting regularly on his work and progress. Towards the end of the semester, he sums up his studies and sends this summary to two other students. The three students comment each other’s reflections and communicate three points to their advisor.</td>
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<tr>
<td><strong>Self-development</strong></td>
<td><strong>BA-diploma</strong></td>
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<tr>
<td>Anne becomes aware of some weaknesses in her presentation skills. She decides to take an extra class on this topic to reinforce this specific skill.</td>
<td>Robert has reached the end of his bachelor studies and has to use his portfolio for the BA-assessment. He must make sure that all the necessary content is in the portfolio. For the BA-degree he has to choose himself a selection of papers and assessments that show his development and progress as well as possible. He writes an overview of his activities during the BA-studies and reflects on his development during this time, and describes his interests and plans for future projects (MA, job). He also presents this work to his professor and discusses it orally with him.</td>
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<tr>
<th><strong>Preparing for a test</strong></th>
<th><strong>Further education</strong></th>
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<tbody>
<tr>
<td>After four semesters, Anne takes a language test. She uses documents from high-school to prepare for it. During the same semester, she has also written two papers and given a presentation. She stores and documents these achievements in her growing ePortfolio.</td>
<td>Robert wants to apply for a three year education in New Zealand. Fortunately, he has collected all his private, professional and educational work in his ePortfolio: publications, papers, assessment results, certificates, band projects, critics in newspapers and magazines, instrumental courses, etc. Therefore it is easy for him to find necessary material for his application. Originally, he got the idea for this further education after presenting his portfolio to a career service agent who helped him to pinpoint interesting career-steps based on the overall picture presented in the portfolio. He exports his ePortfolio to the institution in New Zealand and checks it with his new advisor, comparing it with a list of possible skills to aim at.</td>
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<tr>
<th><strong>Job-application</strong></th>
<th><strong>At work</strong></th>
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<tbody>
<tr>
<td>She applies for a student job and assembles elements from her ePortfolio for her application. She has not decided yet if she wants to present her CV online or as a PDF.</td>
<td>Six years later and well established at work, Robert is still using his ePortfolio to manage his personal development, prepare for appraisal interviews, collaborations, etc.</td>
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<tr>
<td>Curricular advice</td>
<td></td>
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<tr>
<td>At one point, Anne is not quite sure which subject she wants to specialise in. She makes an appointment with a lecturer to discuss this. As a preparation, she invites the lecturer to look at her ePortfolio and makes some papers and reflective documents available for this purpose.</td>
<td></td>
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<th>Changing universities</th>
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<tr>
<td>Anne wants to apply for a job at a foreign university where she would write her doctoral thesis.</td>
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She chooses the elements in her ePortfolio that show her qualifications and interest for the job in question: papers, publications, assessment results, references of former jobs, relevant activities and memberships, etc.

Then she combines everything to an application and adds an application letter with a description of her PhD-project.
2. ... Teachers

Introducing ePortfolios to your teaching means guiding your students towards a new perspective of education, where they learn to assume more responsibility for their personal careers. This individualistic aspect also affects your teaching-style. Depending on your institution’s strategy, your role in the adoption of the ePortfolio approach may vary. You might be involved in larger ePortfolio activities or primarily use it within your own course or study programme. Consequently the type of activities you choose may vary in nature and scope. The following considerations are meant to help you define your personal ePortfolio-strategy. It would be best to create your own ePortfolio first.

2.1 Teaching the ePortfolio Way:

After having read the guidelines for students, you will have realised that teaching the ePortfolio way implies some change in your work and responsibilities:

- Students are responsible for organising their ePortfolios, teachers are responsible for giving the necessary information and explanations about using the ePortfolios.
- Reflection is necessary to assure continuity and successful development of the students’ learning.
- ePortfolios can bridge several courses and allow for a larger overview and integration of earlier learning.
- Using ePortfolios for assessment allows for formative as well as summative assessment.
- Teachers may profit from coaching to get to know the advantages and pitfalls of teaching the ePortfolio way.

Your students need to know:

- What is a ePortfolio? General definition, reflexion, metacognition, key component to success (e.g. using the ePortfolio to develop strategies, define and achieve goals, or to explain and communicate skills and achievements, become aware of strengths and weaknesses, etc.)
- The life cycle of a ePortfolio, i.e. the process of making learning experiences, collecting artefacts, selecting and editing them, designing and personalising their ePortfolio, reflecting on their work, defining the views they wish to communicate, focusing on their achievements and planning new projects to enter into the cycle again.
- Components of an ePortfolio (artefacts): what can be integrated?
- How you will use the ePortfolio for assessment
- Types and further uses of an ePortfolio
- Guidelines: reflective practice, competence grid (helps to have an overview of studies and areas of competencies).
- Practical information (technical surrounding, support)
- Further benefits like exporting of the ePortfolio for lifelong use, keeping a CV up to date, etc.

**Your personal approach:**

- Find out about ePortfolios at your institution (availability, support, instruction, etc.)
- Create your own ePortfolio to collect some experience (advantages and difficulties)
- Decide on where and how you want to use ePortfolios (assignment or whole course, assessment, etc.)
- Think about possible changes in your role as a teacher (more variety in students' work and communication, different ways of achieving good results, more need of advice)
- Inform your students on the basic concept and their responsibilities, reinforce their skills in ICT, design and readability, introduce them gradually to ePortfolio-work by giving small tasks, including exercises in metacognition and the reflective process.

For more details see the annexe "Teaching with ePortfolio".
2.2 Example: Step by step

Describe what your course offers

Let your students know what you expect of them

Explain how to use the ePortfolio
Give feedback and let the students give each other feedback during the course

Finally, discuss and assess the work done
2.3 Learning Objectives

Defining learning objectives is a key component of working with ePortfolios. Learning objectives
- define/inform on what is to be learned in the (limited) time at disposition.
- are necessary for planning work (students and teachers), content and method of a course (teachers), and assessment.
- are based on the competencies to be achieved by the end of the course, education, etc.
- help to organise and define the curriculum.

A taxonomy of learning objectives can be helpful in aligning learning objectives, learning activities and assessment.

2.4 Feedback

Feedback and reflection are two sides of the same picture; they complement each other in an individual's learning-process.

Feedback is a “give and take” for all parties involved, such as peers, teachers, tutors, advisors, employers etc.

The ePortfolio provides a useful basis for feedback (reflection, teamwork, presentation, etc.) and is itself shaped according to feedback received (layout, choice of artefacts, quality of writing, etc.)

- Practice giving feedback
- Define criteria for useful feedback
- Balance between open and rigid feedback
- Workload and benefits of feedback can be LARGE

Feedback takes place in dialogues, group discussions, written comments, etc. Feedback concerns goals, expectations, motivation, progress, ideas, etc. It shows where one stands, where one could go and how to continue.

2.5 Assessment

- ePortfolios can be used for or combined with several types of assessment: formative, summative, peer-, self-, etc.
- ePortfolios offer a large amount of information that can be assessed and built upon (factual, developmental, etc.).
- Decide on what is to be assessed: skills, learning, performance, products, oral and written tests, group-work, etc.
● Inform from the beginning about what is to be assessed and provide the necessary guidelines: learning outcomes, marking grades, grid of competences, standards, etc.
● Give feedback and ask students to give each other feedback.
● Provide valid, verifiable assessment
● Think about long-term assessment (bridging several courses, personal development planning, etc.)
3. ... IT-department

3.1 Main issues:

1. ePortfolio is not an LMS
2. Key Issues: security, performance, data protection, etc.
3. Technical support necessary
4. ePortfolio-content should be exportable/importable
5. Basic functionality to be provided according to the level desired
6. Ownership by students
7. Interlocking/linking of LMS and ePortfolio
8. Open interface to the personal learning- and working-environment of students.

You will find a more detailed description of these points below.

3.2 Checklist:

Depending on your institution’s strategy, the technical requirements for establishing and supporting ePortfolios will vary considerably. These guidelines are meant to be a checklist with suggestions for what you might need to consider. The colour-codes refer to further information or important points:

Reference for further information on the topic

Check with your directory board: compulsory consultative decision to be taken
[Information that can apply or not depending on your institution strategy]

Terms used:

- artefacts: video, audio, pdfs, powerpoints, word, excel, blogs, texts, ...
- directory board: ePortfolio coordinator, rectorate, .....  
- official data/documents: exam results, certificates, grades, diploma supplement, researcher profile, ...
- embedded artifacts: youtube, delicio.us, twitter, slideshare, ...

1. ePortfolio is not a LMS
A Learning Management System (LMS) is a teacher-centered platform, whereas an ePortfolio is student-centered (see point 2 - Ownership).
With a LMS, a student is given access to the site for a certain task and period of time, for instance during a course. The teacher manages the LMS and decides how and when students use it.
With an ePortfolio, students can be asked to do a certain task, but they administer their ePortfolios themselves and can also use them for other purposes.
2. Ownership of the ePortfolio
The student (or user) is the owner of the ePortfolio. This means that he decides who may see what and when. Unauthorised consulting of the ePortfolio by third parties (teachers, administrators, etc.) is forbidden.

3. Consultation access of the ePortfolio
The student can give reading, commenting/editing access to people inside the institution (teachers, other students, counselors,...), to people outside the institution (people from other institutions, future employers, ...), or to the public in general.

4. Legal regulations about content diffusion in the ePortfolio
If needed, create or adapt your institutional user agreement on terms and conditions and privacy statements to clearly determine who is responsible for what (copyright, plagiarism, defamation, ...).

[5. Outsourcing of ePortfolio hosting]
In case of outsourcing your ePortfolio platform, your legal department should check that the service provided complies with the cantonal and federal law (data protection law, privacy law, privacy ordinance, information security ordinance, obligation of secrecy and professional discretion, ...).

Samuel Witzig - Mahara @ ZHAW: Some Legal and Practical Aspects
http://www.eduhub.ch/export/sites/default/info/reports/Witzig_Legal_Aspects.pdf

6. Account creation
Before implementing the login system, check with your directory board who can have an ePortfolio, which type of authentication system is needed (shibboleth, ldap, etc.), to whom users can give consulting (reading? See above, point 3) commenting/editing access and include mid-term projection.

Example of target groups:
Bachelor / Master / PhD / Exchange students / Alumni / Auditor / ......

7. Account activation
Check if some activation conditions have been set by your directory board.

Example of activation conditions:
Must have agreed to the User Charter / Must have followed an introductory course / Must have completed the quiz / must have watched the demo / ...

8. Display of certificates, reports, etc. [Linked to e-Identity project]
An ePortfolio can serve as storage place for official documents, making it unnecessary to send the original documents to whoever needs to see them. It must be ensured that the documents cannot be falsified or used without authorisation. Check with your institution which level of display they would like.

Level 1: official data listed but not displayed in original form.
Level 2: official data listed, original form of document only available inside the institutional ePortfolio.
Level 3: official data listed, original form of document can be provided to other national/international ePortfolio systems.

9. Portability
Export of the ePortfolio to other systems (ePortfolio, personal computer, websites, ...) is crucial. Be aware of the current norms.

Leap2A: http://www.leapspecs.org/2A/
IMS ePortfolio: http://www imsproject.org/ep/epv1p0/imsep_bestv1p0.html

Level 1: export of ePortfolio content as individual artefact (texts, videos, audios, ...)
Level 2.1: export of ePortfolio content to other ePortfolio systems
Level 2.2: building of gateways between the ePortfolio and other systems such as LMS, CMS, and other tools used at the institution.
Level 2.3: export as HTML files.
Level 3: automatic export from LMS, CMS and other tools used in the institution.

10. Import of ePortfolio
Be aware of the current norms.

Leap2A: http://www.leapspecs.org/2A/
IMS ePortfolio: http://www imsproject.org/ep/epv1p0/imsep_bestv1p0.html

Level 1: manual import or embedding of individual artefacts done inside the institution (during the studies)
Level 2: manual import or embedding of individual artefacts produced inside or outside the institution.
Level 3.1: automatic import from other ePortfolio systems.
Level 3.2: automatic import from LMS, CMS and other tools used in the institution

11. Security of external artefacts
Regarding the embedding of external artefacts (YouTube, etc.): what is allowed?

12. Data storage
Storage capacity needs to be considered in terms of duration and import capacities offered.
Level 1: storage space offered to student only during their studies at the institution and for artefacts produced inside the institution (corresponds to point 9 - Import Level 1).
Level 2: storage space offered to student only during their studies at the institution and for artefacts produced inside and outside the institution (corresponds to point 9 - Import Level 2)
Level 3: storage space offered for students (alumni) for X years after they have left the institution with the possibility to continuously update the content (import of new artefacts).
13. Template for artefact presentation
Check with your directory board if the presentation (template, layout, design) should change depending on the artefact’s origin:

1. official data/document
2. artefact internally validated or produced inside the institution (for example coming from the LMS or other institutional tool/system)
3. artefact produced outside the institution

14. Layout
Students should be able to customize and organise their ePortfolio (structure and visual aspect). Check with your directory board if some corporate identity must be followed or provided.

15. Architecture
ePortfolio is a process and a product. Tools are necessary to sustain the process and for students to elaborate their product. This can be provided either within one unique platform or by aggregating various tools. Use the “Aide à l’élaboration du cahier des charges de l’eP” to define the functionalities already covered by other institutional tools, determine the ones that your ePortfolio must provide and identify the gateways that you might want to build between the different institutional tools and your ePortfolio.

JISC Effective practice with ePortfolios
http://www.jisc.ac.uk/whatwedo/programmes/elearning/ePortfolios/effectivepracticeePortfolios.aspx

16. Assessment process
How can the ePortfolio be adapted for assessment purposes (via LMS, pdf export, etc.)

17. ePortfolio systems
Wiki, Blog, LMS, ePortfolio etc. are possible tools for ePortfolios. Several LMS have integrated ePortfolio elements (Moodle, Olat, ilias etc.). To decide about the tool, first analyse what the ePortfolio is to be used for (didactical scenario, etc.). Then, for details on the different tools, see the matrix on the webpage:

Webpage on ePortfolios
http://www.jisc.ac.uk/whatwedo/programmes/elearning/ePortfolios/effectivepracticeePortfolios.aspx

4. ... Decision-makers
Given the variety of possible definitions and uses, introducing ePortfolios requires a number of preliminary decisions to be taken at institutional level. Some of them concern the positioning of the institution in a wider context (6.1), and in case the ePortfolio appears as an interesting option, the nature of the chosen approach (6.2) and the scale of implementation (6.3) will have to be determined. A subsequent round of decisions will then be needed to prepare the implementation phase (6.4), regarding such dimensions as cost and time allocation, support, technical aspects and issues that have to be anticipated. This document provides an overview, from the more abstract to the practical, of the main aspects to consider and helps decision makers to identify potential risks and drawbacks. Finally, some further considerations and points of advice are listed (6.5).

4.1. Positioning of the institution in the wider context

The ePortfolio, as an approach and as a tool, can be seen as a possible answer to some of today’s demands in the educational landscape. On the one hand, education is no longer seen only as a basis for professional life, but also as a continuing lifelong engagement induced by expectations in terms of knowledge and skills development. On the other hand, today’s wide access to information and technology opens for a large flexibility and internationalisation in education. This blurring of the frontiers of education and life cycles influences the role of educational institutions.

Some of these changes concern the professional integration of students (for details, see annexes “a) Alumni “and “b) Career services, Employers”) and future researchers: The competitiveness of our globalised society requires from people a high level of self-awareness. Hence the development of metacognitive skills, as recommended in the National Quality Framework - learning to learn skills - is crucial. The ability to show the high quality of the training received and the learning outcomes that have been reached, makes ePortfolios interesting for students as well as institutions; they offer transparency and more insight into students’ competences than the diploma alone.

4.2 Nature of the chosen approach

An ePortfolio can serve various needs, but its core element is that it should be seen as a tool to sustain metacognition, regulation and critical thinking. As such, various types of uses can be distinguished. These are non exclusive and each institution has to decide upon the specific combination to be implemented. The various components of these uses are further compiled in the annexed decision-matrix.

- **Showcase**: achievements, personal experiences, learning processes
- **Assessment ePortfolio**: learning processes, soft skills, specific skills
- **Certification**: productions and construction of an ePortfolio used for in- or extracurricular certification
• *Personal and professional development*: personal development planning.

### 4.3 Scale of implementation

Since ePortfolio deals with individual identity building, its usefulness is not exclusively limited to teaching situations. Students can be given responsibility to make their own use of the tools and activities, the extent of which must be decided upon. ePortfolio deployment can be envisioned at various scales and at different levels of structural integration. It can be seen as intertwined with courses or considered as a separate or parallel objective. Furthermore, ePortfolio activities can extend across courses, entire or part of the degree programme, or have a broader learning scope in terms of content and learning outcomes and time span. Moreover, in a lifelong perspective, decisions must be made according to the articulation with other learning experiences, either previous or future ones (post-secondary education, mobility programmes, alumni).

### 4.4 Preparing the implementation phase

Once the pedagogical scenarios and scale of implementation have been decided upon, some strategic decisions will have to be taken in terms of cost and time, support, tool and issues that have to be anticipated. The scope of the resource allocation needed will depend on the approach retained.

- **Cost and time**: identifying clear goals, scalability (course, programme, institution), training of staff, timeline and stages for deployment, analysis and decisions about the ePortfolio tool(s)
- **Support**: management of the ePortfolio project
- **Tool**: choice, specifications including integration of specific activities (reflective functionalities, publishing possibilities, …) and technical integration with the institutional infrastructure
- **Issues that have to be anticipated**: non-coordinated decisions, resistance (due to lack of involvement in the decision-making process, lack of information, fear of more work), commitment of stakeholders.

### 4.5 Further advice regarding the implementation phase

Alongside the decisions affecting the implementation phase, some general issues also need to be addressed, such as:

- Providing adequate human resources, if needed, to plan, develop, implement and operate the project
- Introducing the concept to the staff, giving the teachers a strategy-document with answers about what they will “get” in return for their investment, for instance less pressure on the side of subject matter, more depth in learning because of metacognitive activities.
Taking the different levels of teacher-knowledge into account: How much do the teachers know about electronic tools? Have they tried to use them? Do they see advantages in using electronic tools for teaching? Do they coordinate their work and experiences with other teachers?

Planning a test-phase, perhaps creating a test-group of interested teachers who become thoroughly introduced to the idea, concept and benefits of using ePortfolios. Invite this group to participate in planning the introduction of ePortfolios to the rest of the staff.

Motivating everybody involved as best possible by giving incentives and good education.

Providing regulations about copyright, plagiarism, defamation, etc. and distribute them

Providing examples of ePortfolios suitable for different contexts (including the process phase, not only the final product), providing templates for the presentation of artefacts

Giving precise information to the IT-department, for instance about the creation, activation, support and storage of ePortfolio-accounts, or about what happens to students who are registered at two different institutions

Thinking about corporate identity, customisation and organisation, an alumni-strategy, etc.

Providing support for stakeholders during all phases of implementation, keeping the management informed on what is going on.
Toolbox

a) Reflective Practice

- Reflecting comes naturally. It plays an important role in learning.
- By refining reflective practice, learning becomes more purposeful and goal-oriented.
- Reflecting implies cognitive skills such as observing, analysing, making concepts, etc.
- Knowing about these skills helps to become a more strategic, aware learner.

Practise Reflecting

Choose an activity, e.g. writing a paper. Note why you chose to write this paper, what you did, what you learnt, what you could do better and what (else) you could use this paper for. This reflection could be discussed with peers or teachers, and be used for assessment. Both your paper and the reflection and feedback can be filed in your ePortfolio.

You could also reflect on your ePortfolio. What did you achieve last month? What helped or hindered you in achieving your goals? What have you added to your ePortfolio during the last month? What do these additions mean to you? Which are the actual goals for your ePortfolio? What do you want to achieve this month? How do you feel about your ePortfolio?

Try to choose SMART goals (S = specific, M = measurable, A = attainable, R = relevant, T = time-bound)

Practice reflecting regularly for effective learning and teaching.

Effects of reflecting

- Learn more from your activities
- Get to know your personal strengths and weaknesses
- Identify subjects you need to work on
- Good basis for feedback

Further Information

There are several models to help deepening reflection, by authors such as David A. Kolb, Graham Gibbs, Chris Johns, Gary Rolfe, Donald Schön, John Hattie, etc.

Most models include cycles of questions that are meant to lead to deeper reflection. A very short example by R. Greenaway:

- **Do**: Have the experience
- **Review**: Review what happened and what can be learned from the experience.
- **Plan**: Plan a way to approach the next round of experience.
b) Teaching with ePortfolio

The following tables guides you through the details of introducing ePortfolios in your work. Depending on the extent to which your students are familiar with ePortfolios, they will need more or less guidance. The three columns „First steps”, „Deployed” and „Fully developed” suggest tasks with different degrees of sophistication, depending on what your students are able to cope with at various stages.

1. Your role as a teacher

<table>
<thead>
<tr>
<th>First steps</th>
<th>Deployed</th>
<th>Fully developed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Be prepared to refine your role as a teacher.</td>
<td>Explain your didactic priorities in order to help students understand what to collect (reading notes, thoughts, artefacts) and how you expect them to communicate it.</td>
<td>Make sure that learning objectives are provided, understood and used by students for regulating their learning process. Help students to decide how to communicate their expertise.</td>
</tr>
<tr>
<td>Take into account that communication comes in more variety in current societies.</td>
<td>Ask your students about their preferred forms of communication and discuss with them how these or similar means could be used for documenting and reflecting, design a publishing activity accordingly.</td>
<td>Let your students publish and communicate according to some jointly settled rules, according to your requirements, allowing for a combination of various forms of expression of expertise and competence.</td>
</tr>
<tr>
<td>Consider that a high level of learning can be achieved in various ways.</td>
<td>Show students the difference of formal domain specific writing (scientific, literary etc.) and a less formal writing (personal reflection, comments etc.) on what and how they have learned.</td>
<td>Allow for the use of a variety of writing styles and media formats while making sure as an expert that your students work and learn in accordance with scientific rules and practice.</td>
</tr>
</tbody>
</table>

2. Introducing ePortfolio-work

| Explain the basic concept to your students. | Choose a pragmatic approach. Suggestion: Design one assignment containing: 1) A typical assignment of yours. 2) Let them describe what they have learned. 3) Let them reflect on it by providing an inspiring question, e.g.: How they could have done it in a different way. --- How does it relate to other authors they know. 4) Give them some time for this. 5) Let them publish and discuss these thoughts, with you or with the class. | Discuss the Student’s Guidelines in your class and explain, within the context of your course, what your expectations of ePortfolio work are. | Encourage students to widen their perspective by enriching their reflection with elements of personal and professional experience. |

Address the division of... | In case you use an ePortfolio tool, | Make sure students read and | Encourage students to maintain |
responsibility between teacher/student. explain the differences between a student-owned environment and a teacher-managed system, e.g. that only students can publish and delete data. Be aware that it is the responsibility of the teacher to integrate ePortfolio work with all other forms of study. It is also important to acknowledge the efforts of your students. understand the information about their rights and duties, in particular that they take responsibility for their published data in terms of copyrights, citations and backups. their data, especially to associate all published data with its source (university firm, personal etc.) and to respect matters of privacy and confidentiality.

For the parts that are published, reinforce skills in ICT, design and readability. Explain the differences of typical academic writing and the ways of publishing elements in a non-linear way, like you would within an online magazine. Have your students try it out. Remind students that online-writing requires saving often. Explain to students that they have to work on the readability of their productions, adapting them to their actual target public (e.g. teacher, scholarship organisations, fellow students, potential employer). Introduce your students to the advanced possibilities of your institution’s ePortfolio based on the available guidelines and templates.

3. Special features of ePortfolio-teaching

Refine the assignment process. Define learning objectives / outcomes so that students can relate to them and keep them in mind during the whole process. Support students in understanding them. Provide a grid or list of reference of competences in your field of study, if available with the levels of achievement you expect. Relate your assignments to them. Design assignments and activities for Students in accordance with the larger ePortfolio process of your institution.

Define the workload. Find out if other colleagues of yours are also giving ePortfolio-related work to students and make sure the activities are varied, stimulating and result in a reasonable workload for students. Coordinate among teachers some possible multi course assignments and activities. Allow for re-contextualising already produced outcomes and settings in new activities or different courses. Take part in or lead an institutionally coordinated approach to a context, more global within your field of expertise.

Practically support ePortfolio work. Make clear what kind of outcome you expect, based on the tools and the resources available, e.g. PDF-files, pictures, web pages, wikis, institutional ePortfolio artefact, multimedia items and so on. Design activities that include comments and feeds in order to reinforce students’ competence in reflecting upon their learning. Make sure they have the necessary tools. Identify ICT-skills that are needed to extend ePortfolio-work beyond degree program level (different target group, other kind of expected readability, production of complex artefacts). Advise students to develop their abilities.

For a successful introduction of ePortfolios, you need to have a clear idea about how the ePortfolio-process works and introduce this process efficiently to your students. Having your own ePortfolio helps to discover possible pitfalls.
c) Decision matrix

The decision matrix (below) gives a detailed overview of what needs to be taken into consideration when deciding about ePortfolios. It begins with some general strategic questions and then looks at various types of ePortfolio-usage (learning process, showcase, assessment, certification, and professional and personal development. The main aim is to remind and inspire people involved to consider as many eventualities as possible.

General terms used (*Cambridge Dictionary online*):

- skill: an ability to do an activity or job well, especially because you have practised it.
- template: something that is used as a pattern for producing other similar things.
- scale: a set of numbers, amounts, etc. used to measure or compare the level of something.
- grid: a pattern or structure made from horizontal and vertical lines crossing each other to form squares.
- competence: the ability to do something well.

Specific terms used (*Glossary of the Bologna Follow-up Group*):

- National Qualification Framework (NQF.ch-HS): Description of all qualifications and other learning achievements in higher education... which is internationally understood
- Learning outcomes: Statements of what a learner is expected to know, understand and/or be able to do at the end of a period of learning.
- Learning objectives outline the material the instructor intends to cover... Learning outcomes should focus on what the student should know and realistically be able to do by the end of an assignment...*University of Toronto*
- Workload: A quantitative measure of the learning activities that may feasibly be required for the achievement of the learning outcomes (e.g. lectures, seminars, practical work, private study, information retrieval, research, examinations).
- Descriptors: Generic statements of learning outcomes. They provide clear points of reference that describe the main outcomes of a qualification often with reference to national levels.
- Dublin descriptors: define learning outcomes in 5 categories (Knowledge and understanding, Applying knowledge and understanding, Making judgements, Communication skills, Learning skills)
- Tuning project competences: The ability to apply learning outcomes adequately in a defined context (education, work, personal or professional development). Competence is not limited to cognitive elements (involving the use of theory, concepts or tacit knowledge); it also encompasses functional aspects (involving technical skills) as well as interpersonal attributes (e.g. social or organisational skills) and ethical values.
<table>
<thead>
<tr>
<th>Cost &amp; Time</th>
<th>Support</th>
<th>Tool</th>
<th>Issues that have to be anticipated</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Strategic decisions</strong></td>
<td>Identifying clear goals</td>
<td>Management of the ePortfolio project</td>
<td>Choice, specifications</td>
</tr>
<tr>
<td></td>
<td>Scalability (course/programme/institution)</td>
<td>Expert advice</td>
<td>Workshops, Information and course materials</td>
</tr>
<tr>
<td></td>
<td>Training of staff</td>
<td>Didactic help</td>
<td>Human resources department</td>
</tr>
<tr>
<td></td>
<td>Establish infrastructure for technical and content-related support</td>
<td></td>
<td></td>
</tr>
<tr>
<td></td>
<td>Timeline and stages for deployment</td>
<td>Various experts</td>
<td>Checklist, analysis</td>
</tr>
<tr>
<td></td>
<td>Analysis and decisions about the ePortfolio tool(s)</td>
<td></td>
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</table>

**Types of ePortfolio uses**

**Learning processes**
- Means for supporting the process of change (students, teachers and technical staff)
- Specialized knowledge and staff

**Metacognition**
- define reflective practice
- develop material
- examples of reflective practice (with or without learning objectives)
- forms (e.g. learning journal entry templates, checklists, ...)
- scales

**Integration of knowledge**
- develop guidelines
- guidelines on how to build relationship between past and present areas of study, lists of questions
- domain-based scenarios
- workload (students and teachers) -> integration with others types of study work

**Planning of learning**
- defining a policy about teachers forming a list of learning objectives e.g. in accordance with the National qualification framework, Tuning project competences, Dublin
- student advisor
- tutor
- mentor
- adequate means to foster the policy about learning
- grid of reference skills / self-assessment checklists
- lists of learning objectives
- integrated learning plan

- recognition for the effort (student & teacher)
- teacher & student: change process (culture, Identity, practice)
- training of teaching/support staff

- same type of activities requested by various teachers will bore students -> coordination will be needed
- discrepancy in the availability of learning objectives (depending on institutional policy)
### Identifying strength and weaknesses

- descriptors, ...
  - implementing the policy
- develop guidelines
  - mentoring
  - study skills workshops
- template (tool, module, ...) that can be filled in by the student
- Grid of reference / self-assessment checklists
- cheating

### Showcase

- Means for designing the site
  - Technical support
    - Design & publishing support (guidelines, short courses, ...)
    - Legal considerations
- Allow or enforce for corporate identity, customization and organization of views, artefacts, ...
  - Providing functionalities allowing for easy import of personal files, products, items, ...
- Dealing with legal issues, eg. user agreements on terms and conditions of use, copyright, plagiarism, libel, ...

### Of achievements

- defining and designing presentation site
  - pre-professional support (introductory work, workshops, documents, ...)
- templates for presentation
  - access to administrative data (degrees, certificates, validated artefacts, ...)
  - learning objectives, if available
- security and validation procedures (secured gateways to official data)

### Of personal experiences

- defining and designing presentation site
  - pre-professional support (introductory work, workshops, documents, ...)
- warnings about the risks, rights and duties
- volume and responsibility of storage (data, files, videos, ...)
- general standards

### Of learning processes

- create introduction to process planning
  - coach teachers
  - examples
  - teacher guidance
  - group work
  - guides for making a learning process explicit (selecting and organizing items) with or without learning objectives

### Assessment

- formulate exigencies for validation
  - ensure congruency of curriculum, assessment and learning objectives
  - develop or adapt competence grids for (self)evaluation
  - qualify teachers for ePortfolio assessment
  - decide between types of assessment (formative, summative) that are compatible with existing regulations
- meetings with teachers
  - legal advice
  - technical support (written tests, ...)
  - coaching teachers
  - publication in study programme
  - examples of various types of assessment
    - assessment-scales
    - study programme
    - learning objectives
- recognition for the effort (teacher)
  - compatibility
  - cheating
  - size of ePortfolios might need to be determined
  - assessment of teamwork
  - teacher workload
  - group exams
  - honesty of student
  - degree of re-working tasks

### Of learning processes

- create introduction-course and documentation for teachers
  - decide on timeline and objects of rating
- meetings with teachers/coach
  - legal advice
- scales for grading reflection
  - self-assessment grid
  - blog, journal

[30]
<table>
<thead>
<tr>
<th><strong>Of soft skills</strong></th>
<th><strong>Of specific skills</strong></th>
<th><strong>Of competence</strong></th>
<th><strong>Certification</strong></th>
<th><strong>Of course-work</strong></th>
<th><strong>Of completed studies</strong></th>
<th><strong>Of other achievements</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>- detailed information for students</td>
<td>- scales for rating achievement of learning objectives</td>
<td>- scales for rating evidence of competence</td>
<td>- decide on and describe standards to be achieved</td>
<td>- develop routines to be followed for validation</td>
<td>- routines for validation of achieved learning outcomes</td>
<td>- define criteria for validation</td>
</tr>
<tr>
<td>- template presentation</td>
<td>- meetings with teachers/coach</td>
<td>- meetings with teachers/coach</td>
<td>- legal advice</td>
<td>- administrative help technical support for filing</td>
<td>- inform teachers</td>
<td>- administrative help</td>
</tr>
<tr>
<td></td>
<td>- scales for grading reflection</td>
<td>- scales for grading reflection</td>
<td>- legal advice</td>
<td>- templates (certificate,..)</td>
<td>- decide on acknowledgment of foreign courses</td>
<td>- guidelines for validation</td>
</tr>
<tr>
<td></td>
<td>- (self)assessment grid</td>
<td>- (self)assessment grid</td>
<td></td>
<td>- learning outcomes assessment grid</td>
<td>- qualifications framework</td>
<td>- quality of foreign education</td>
</tr>
<tr>
<td></td>
<td>- privacy</td>
<td></td>
<td></td>
<td>- distribution of student workload (several courses)</td>
<td>- study programmes</td>
<td></td>
</tr>
<tr>
<td>Professional &amp; personal development</td>
<td>- mentoring - checklists and tests - Transition to workplace, reference grid discussed with professional world - goal-setting process and evaluation templates and examples - Duration of access</td>
<td></td>
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</tr>
<tr>
<td>Personal Development Planning</td>
<td>- Qualify advisors for the process - Advising students - individual or group mentoring - technical support for setting up ePortfolio - templates for defined goals and reflecting checklist for personal skills etc - workload of advisors - cost of advising</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Carrying out plans</td>
<td>- Feedback and (practical ) advice - access to advisors - reflection tool site for self-presentation (CV, etc.) - obstacles (financial, professional) - amount of feedback - authenticity</td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Documenting activities</td>
<td>- advisors - access to advisors or peer mentoring - Templates for documenting milestones, experiences, achievements, etc -</td>
<td></td>
<td></td>
<td></td>
<td></td>
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</tr>
<tr>
<td>Evaluating and making new plans</td>
<td>- Advising students/alumni - Feedback by mentor on achievements and next steps - Learning journal or other reflection tool - Templates for evaluation - motivation - obstacles (financial and professional)</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>
## d) Glossary

<table>
<thead>
<tr>
<th>Français</th>
<th>Deutsch</th>
<th>English</th>
</tr>
</thead>
<tbody>
<tr>
<td>Acquis de formation</td>
<td>Lernerergebnisse</td>
<td>Learning outcomes</td>
</tr>
<tr>
<td>Apprentissage auto-régulé</td>
<td>Selbstreguliertes Lernen</td>
<td>Self-regulated learning /</td>
</tr>
<tr>
<td>Apprentissage en autonomie</td>
<td>Autonomes Lernen</td>
<td>Independent learning / Autonomous learning</td>
</tr>
<tr>
<td>Apprentissage tout au long de la vie</td>
<td>Lebenslanges Lernen</td>
<td>Lifelong learning</td>
</tr>
<tr>
<td>Evaluation</td>
<td>Assessment</td>
<td>Assessment</td>
</tr>
<tr>
<td>Bilan de compétence</td>
<td>Portfolio der Kompetenzen</td>
<td>Portfolio of Competence</td>
</tr>
<tr>
<td>Capacité, habilité</td>
<td>Fähigkeit</td>
<td>Ability</td>
</tr>
<tr>
<td>Capacité, compétence</td>
<td>Fertigkeiten</td>
<td>Skills</td>
</tr>
<tr>
<td>Comparabilité</td>
<td>Vergleichbarkeit</td>
<td>Comparability</td>
</tr>
<tr>
<td>Compétence</td>
<td>Kompetenz</td>
<td>Competence</td>
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<tr>
<td>Compétences clés</td>
<td>Schlüsselkompetenzen</td>
<td>Key competences</td>
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<tr>
<td>Compétences de base</td>
<td>Grundfertigkeiten</td>
<td>Basic skills</td>
</tr>
<tr>
<td>Conditions préalables</td>
<td>Zulassungsbedingungen</td>
<td>Admission requirements</td>
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<td>Contenu de formation / d'apprentissage</td>
<td>Lerninhalt</td>
<td>Learning content</td>
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<td>Employabilité</td>
<td>Arbeitsmarktfähigkeit</td>
<td>Employability</td>
</tr>
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<td>Evaluation</td>
<td>Evaluation / Einschätzung</td>
<td>Evaluation</td>
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<td>Evaluation par les pairs</td>
<td>Peer-Evaluation</td>
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<td>Filière Cursus</td>
<td>Studiengang</td>
<td>Education/training pathway</td>
</tr>
<tr>
<td>Formation des adultes</td>
<td>Erwachsenenbildung</td>
<td>Further education</td>
</tr>
<tr>
<td>Grille critériée</td>
<td>Rubrik</td>
<td>Rubric</td>
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<td>----------------------------------------</td>
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<tr>
<td>Grille pour l’auto-évaluation</td>
<td>Raster zur Selbsteurteilung</td>
<td>Self-assessment grid</td>
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<tr>
<td>Journal d’apprentissage</td>
<td>Lerntagebuch</td>
<td>Learning journal</td>
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<tr>
<td>Liste de repérage pour l’auto-évaluation</td>
<td>Checkliste für Selbsteinschätzung</td>
<td>Self-assessment checklist</td>
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<td>Médiateur d’apprentissage</td>
<td>Lernberater</td>
<td>Learning facilitator</td>
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<td>Objectif</td>
<td>Lernziel</td>
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<td>Référentiel</td>
<td>Standard</td>
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<td>Savoir</td>
<td>Wissen (Kenntnisse)</td>
<td>Knowledge</td>
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<td>Savoir-être</td>
<td>Verhalten</td>
<td>Performance ?</td>
</tr>
<tr>
<td>Savoir-faire</td>
<td>Know-how</td>
<td>Know-how</td>
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<tr>
<td>Seuil de performance</td>
<td>Anforderungsniveau</td>
<td>Level of achievement</td>
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<td>Übertragbarkeit</td>
<td>Transferability</td>
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<td>Transparenz</td>
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<td>Tutorieren</td>
<td>Tutoring</td>
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<td>Valorisation</td>
<td>Valorisierung</td>
<td>Valuing</td>
</tr>
<tr>
<td>Volume / charge de travail</td>
<td>Workload</td>
<td>Workload</td>
</tr>
</tbody>
</table>
# Annexes

## a) Alumni

Students who have completed their education have several good reasons to take their ePortfolios with them and continue using them. The ePortfolio is, after all:

- A collection of accomplishments
- A self-presentation
- An overview of one’s life and achievements
- A place to update and always have access to your CV
- A means to define strategies and goals
- An instrument to achieve goals
- A set of artefacts owned by the student
- A way to gain a clear idea about strengths and weaknesses
- A place for collaborative work

Therefore, alumni have every interest in keeping their ePortfolios up to date by adding artefacts, further education and experiences, etc. Then the ePortfolio will always be ready for job-applications, new projects, sharing at work, etc.

Continuing to reflect will have some of the same positive effects in a job-situation, e.g. self-awareness, planning, preparing for assessments, etc.

## b) Career services, Employers

### New job

First impressions are very important for employers. They will look at an ePortfolio’s first page, and if the key-words catch their interest, they will look more closely at the ePortfolio for relevant, detailed information on:

- education (certificates, curriculum, achievements, artefacts)
- general interests, activities, experiences and events
- skills (collaborative, presenting, metacognitive)
- working experience (milestones, work samples, development)

Therefore the first page must not contain too much information and the ePortfolio must be well-organised.

Career services will give valuable support. Several services can be of good help, for example:
Advice on how to arrange an ePortfolio for job search
- Support for career-planning
- Contacts to employers or career-events
- Tips about various aspects of searching and applying for jobs.

Actual job
Chances for development in a job are bigger, if the employer notices interest and abilities of an employee. In addition to traditional contacts, an ePortfolio offers insight than can benefit both the employer and the employee, such as:

- Identifying strengths and allocating adequate positions; assigning adequate tasks
- Identifying weaknesses and offering support
- Deciding on further training and qualification to ensure professional development
- Keeping talented employees

Keeping track of experiences and documents that show formal and informal learning makes a valuable basis for a satisfying job-situation:

- Reinforcing self-confidence, aspiring towards new challenges
- Determining skills to be developed
- Showing good work, demonstrating job-commitment
- Exchanging ideas

c) Further reading

Apart from what is mentioned in this document, please consult the eduhub-wiki [http://www.eduhub.ch](http://www.eduhub.ch) for additional references. Look for the SIG ePortfolio pages.