



Policy for
Educator
Evidence in
Portfolios



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Abstract

A policy describes and advocates an ePortfolio career-tracking system for European Union (EU) educators (teachers/trainers) in order to strengthen professionalism and raise standards of teaching and learning. It argues for a need to include non-formal (planned activities) and informal evidence (acquired from normal experiences) as well as formal qualifications, in order to provide a more complete picture of an educator's knowledge and competence. Professional principles (well-qualified, lifelong learning, mobility and partnership) rather than arbitrary standards are suggested as being more enduring and meaningful in transnational contexts as the criteria for selecting appropriate evidence. These are defined for the beginning, middle and specialist stages of a career. The policy and ePortfolio platform were piloted in the partnership countries. Recommendations are made from stakeholder feedback regarding the development of the ePortfolio career record. It is suggested that this tool becomes a mandatory recording system of continual professional development for EU educators in order to assist and confirm professional status and provide a useful passport for mobility. Backing of governments and employers is necessary for EU implementation.

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AN ePORTFOLIO RECORDING SYSTEM TO SPAN AN EDUCATOR'S CAREER

EXECUTIVE SUMMARY

*A **career passport**, for those educating students at any level, is priority now that mobility is crucial to the cultural and economic growth of knowledge in an increasingly global world. This summary answers questions that are required to grasp and implement such an initiative.*

1. What defines a professional portfolio?

It records *goals, achievements and growth* over time with formal, non-formal and informal * evidence of *personal, professional attributes, status, expertise, subject knowledge with understanding and application of learning processes.*

2. What are the purposes of a portfolio?

It records the process of INPUT>OUTPUT>OUTCOME of an educator's knowledge and experience with four main purposes to:

1. Chart learning development and growth to communicate and market oneself
2. Showcase achievements for assessment/evaluation/self-awareness
3. Inspire and influence future choices towards goals and self-fulfilment
4. Review collaboratively for feedback, support and sharing of experience

3. What is the value of a portfolio?

It is a *process* and *product*, with the *whole* greater than the sum of parts. Merging *self* and collaborative evaluation with products (*evidence*) is more than processes or products alone.

Process – *self-examining, reflective, decision-making, goal-setting actions over time in real contexts*

Product – *the portfolio, itself, preserving and sharing work to reflect on teaching activities for review and refining future action*

1. Self-evaluation from reflection: knowledge, competencies and talents to be determined
2. Selection of evidence: assembly of characteristics/qualities to be demonstrated
3. Rationale for entry: recognition of growth and achievement to identify needs and goals
4. Goal-setting: directing self-development for review and revision
5. Portfolio creation: dynamic and cumulative, replacing and streamlining evidence in line with goals.
6. Portfolio development: a flexible framework to showcase growth, achievement and goals.

4. What is the role of others in portfolios? *Other professionals are models for development:*

- Reviewing portfolios and discussing issues relating to growth and achievements
- Assisting in identifying strengths and areas for development
- Helping to set goals for continued progress, review and recording
- Presenting positive attitudes and support for career-long learning

5. What should be included in a portfolio?

Portfolios are *representative* not *comprehensive*, so evidence reflects significant aspects of a professional and their teaching. Firstly, focus is on goals and growth towards these and later achievements. Secondly, it is self and collaborative evaluation, meaningful for the teacher and others involved. Finally, it is dynamic assessment with items added or deleted to fit development. Four classes of evidence are admissible with the creator owning all material and deciding who can have access, at what point and for what purpose:

1. Documents: such as a lesson plan, reflective log, conference/journal article/ review.
2. Recordings: visual/audio recording of a lesson, meeting, discussion with colleague/s.
3. Testimonials: evaluations from colleagues or letters from parents/students
4. Information links: statement of beliefs, goals, rationales, captions.

6. How is a portfolio organised?

EU principles - *applying knowledge, continuing personal and professional development, mobility and partnerships* evaluate evidence rather than using arbitrary *standards* which might change. The platform has five fields:

1. The role of the creator
2. A grid defining principles at early, mid and specialist career levels, mapping to career stage
3. Evidence of *formal, non-formal and informal evidence*
4. Witness statements of evidence selected
5. Summary of previous learning and experience

7. How will the portfolio be evaluated?

Portfolios should include endorsement of evidence by line managers, stakeholders and peer reviews.

* Formal (*qualifications*); non-formal (*planned activities*) and informal (*acquired from experience*)

A POLICY FOR TRACKING TEACHER DEVELOPMENT THROUGHOUT A CAREER:

Rationale for the development of professional portfolios

1. The Context

Teaching is a complex profession, coping with increasing student diversity and struggling to raise educational standards for global competitiveness. In a European institution, known to project partners, there are over 230 different languages spoken, with the native language as the second, third or even fourth one used by students (Sage, 2010). In large cities, around 350 spoken languages are becoming a norm (Sage, 2010). Communicating across many cultures and languages requires great skill, empathy and judgement. So, the environment of an educator (*teacher/trainer*)*, at any level, is immensely challenging and member states are reviewing how they prepare and support them for the vital tasks they perform on behalf of European society.

Educators play a core role in supporting the learning experiences of both child and adult learners. They influence the evolution of education systems and implement reforms which can make the European Union (EU) the highest performing knowledge/competence-driven economy in the world. They recognise that quality education provides learners with personal fulfilment and effective communication, enabling social competencies and greater employment opportunities. Their profession, inspired by values of inclusiveness and individual development, has a major influence on society by advancing human potential and shaping future generations. To achieve its objective, the EU views the role of educators and their career development as key priorities.

The quality of teaching determines Europe's competitiveness in the world and is positively correlated with student achievement (Darling Hammond, 2005). The European Commission Report (2004) on progress towards the Lisbon education and training objectives, as the route out of poverty and means of social inclusion, emphasises the development of key competencies* (2006). As well as imparting knowledge

and understanding, educators must help students become autonomous learners by targeting transferable abilities* rather than just memorising facts to pass tests. This calls for common European competencies and qualification principles for both teachers and trainers. Directive 2005/36/EC provides the legal framework for the *professional mobility* of teachers with *common principles* and *recognised qualifications* to support this. Educators must prepare students to enter society and achieve personal and economic independence by:

- Identifying and responding to learner needs with a range of educational strategies
- Supporting student development as lifelong learners through key competencies*
- Understanding diversity, respecting difference and upholding moral integrity

2. European Principles for Teacher Competencies and Qualifications (2010)

These have been devised in response to challenges laid down in the Joint Interim Report by the European Council and the European Commission on progress towards Education and Training 2010.2. Criteria for educators are defined and recommended in this PEEP policy for evaluating evidence of experience and achievement as arbitrary *standards* change over time unlike *principles* which tend to remain constant:

Well-qualified: requiring extensive subject and pedagogic knowledge to guide students, understanding their physical, mental, emotional, social and cultural needs.

Lifelong learners: needing continual knowledge and skill updating to cope with a rapidly changing world.

Mobility: working/studying in other European countries with mobility central to professional development in a global world with continual movements of populations

Partnership: working collaboratively with all stakeholders for maximum results.

i) Well-qualified

Educators, in top-quality systems, must be graduates from recognised higher education institutions. Achievements should reflect the European Qualifications Framework which embraces pre- and post-graduate levels 2-8 (Appendix 4). Professionals working in initial vocational education are required to be fully qualified and experienced in a specialist field with a relevant teaching qualification. All educators need opportunities to continue study to the highest level in order to develop their teaching competencies and prepare for progression within the profession. Since education is multidisciplinary, they must have extensive subject knowledge, an excellent grasp of pedagogy and its application, to guide and support learners within the social, cultural and political dimensions of education. Teacher training standards for the PEEP partnership are available in Appendix 7.

ii) Lifelong learners

Educators need supporting to continue professional development throughout their careers. Lifelong learning can be *formal, non-formal and informal* (Appendix 5). It includes education, training, retraining

and updating in new knowledge, skills and attitudes that reflect current thinking about learning at all levels and in any context. Education and training can occur in all aspects of an individual's learning, such as subject knowledge, pedagogy, psychology, sociology, philosophy, communication and medical sciences, organisational/management methods, theories and practices. Educators and employers must recognise the importance of acquiring new knowledge to inform work. Institutions need to value lifelong learning, so educators can evolve and adapt by reviewing evidence of effective practice, engaging with research and development to keep abreast of information. They must be helped to participate actively in professional development, including time spent outside the education sector, with recognition and reward for this.

iii) Mobility

Mobility must be a core component of initial and continuing educational experience as today there are regular movements of people across national boundaries. Professional preparation and development programmes should give opportunities to study European languages, including subject-related vocabulary, so that educators can move easily between nations. They need knowledge and experience of European co-operation so they can value and respect cultural diversity and help learners to become responsible EU citizens. Staff can be encouraged to participate in European projects and spend time working or studying in other countries for professional development purposes. Those doing so must have their status and participation in the host country recognised and valued by all parties. There should be mobility between different levels of education and the medical/social care professions working within these both nationally and internationally.

iv) Partnerships

Education adds to the cultural and economic aspects of the knowledge society and must understand this broader context. Educators must work with others, based on values of social inclusion and nurturing learner potential. They require knowledge of human physical, mental, social and emotional development and possible breakdowns, demonstrating ability to assess cognitive-linguistic levels of others for successful interaction and learning. Effective communication, confidence and relationships, when engaging with students and colleagues, inspire all to become active members of society. Educators should also work to increase the collective intelligence of learners and co-operate and collaborate with others to enhance their own learning and teaching. To fulfil these aims, institutions providing education, training and development for staff, should work in partnership with schools, colleges, universities, workplaces, job-based training providers and other stakeholders. Higher education institutions must ensure that teaching benefits from current knowledge and practice. Partnerships focusing on practice, rooted in theory and research, provide educators with the communicative competences, skills and confidence to reflect on events. The education of all teachers needs support and should be encouraged to become the subject of research and advanced study.

The EU is prioritising improvement of teaching quality for a direct effect upon levels of human performance to increase our global economic position (COM, 2007). Demands on educators are evolving with a significant change in remit. They are now expected to take part in lifelong learning and play a major role in developing transferable abilities of learners, along with building knowledge and

understanding in diverse populations. A more complete picture of an educator's personal, academic and practical experience, spanning a career, is now required. This endorses professionalism, with a consistent approach to collecting and evaluating evidence of knowledge and experience, to assist mobility of teachers and the spread of higher educational standards.

After initial training, lifelong professional development starts with induction, along with guidance and mentoring by experienced colleagues, according to personal and institutional goals. So, educators are encouraged to extend and develop competencies; have access to continual professional development (CPD); study for further qualifications and promote creative partnerships to support practice.

3. A Professional Recording System

New policies and practices must be researched, developed and implemented to meet changing needs. Europe comprises a rising number of diverse cultures and ethnic groups with values and attitudes exhibited in different conventions of thinking, communication and action. A more comprehensive, flexible mode of educating, training and assessing teachers meets these demands. A common EU ePortfolio of professional development encourages educators to plan and participate in lifelong learning to validate this process. It addresses on-going monitoring of knowledge, attitudes and pedagogic competencies and their effectiveness in practice within a career dossier. This provides a coordinated, coherent, continuous, cooperative approach to personal-professional development, promoting a culture of reflective practice and research; supporting professionalism and assisting the status, recognition and mobility of educators.

Portfolios are used in professions outside education such as architecture, journalism and medicine (GMC 2003). They enable the inclusion of **formal**, **non-formal** and **informal** evidence for a richer, more complete picture of individual learning and experience. The EU definitions of this are in Appendix 5, taking forward the Council recommendation on validation of non-formal and informal learning (2012). The European Centre for the Development of Vocational Training (CEDEFOP) has emphasised the importance of non-formal and informal evidence, which *'has a key role to play to increase the value of skills and competence developments for adults in the workplace'* (2013 pp. 21). It is to finalise and disseminate results of a study on the validation of this new approach to gathering evidence.

Formal evidence would include a relevant qualification, such as an under-graduate BA or BSc degree or a post-graduate qualification like a Higher Education Certificate or Diploma, an MA or MSc and at a further level an MPhil, subject Doctorate and ultimately a PhD. These can be measured against the European Qualifications Framework (Appendix 4).

Non-formal evidence would be an organised activity, such as a teaching plan and implementation of this with personal analysis, reflection and review of what has been learnt.

Informal evidence has many possibilities. It could record student, colleague or parent comments on something a professional has been involved in, such as a concert, field trip, community or other event with a response to this. Another possibility is a conference review, article or book with reflection on how knowledge and its application have been enhanced. It can also encompass skills acquired through life experience as in running a sports/drama club.

Choice of evidence reflects agreed principles, as described. At pre-qualification stage, this will be reviewed by a tutor with assessment in line with qualifications. In a post-qualification work-role, it will be the annual appraiser. How a portfolio is reviewed is a challenge requiring assessor training to ensure a consistent approach to its use.

4. Support for ePortfolio Recording

There has been strong support for continuous portfolio-logging, to record CPD as well as initial education/training, to track professional development in line with work requirements and career planning. This is envisaged for **assessment, appraisal, job-interview or revalidation** purposes.

Assessment defines the evaluation of competencies against educational/professional principles

Appraisal is a review of performance in relation to job requirements

Job interview is the method for career progression or change

Revalidation checks lifelong learning experiences for annual registration

The potential of portfolios for supporting on-going personal/professional development has been well described (Challis 2001). The largest body of evidence regarding professional portfolio assessment comes from American educators, suggesting that reliability is enhanced with defined criteria, uniform content and adequate training of assessors (Herman 1994). In the UK, the Welsh Assembly advocated the portfolio approach for all teachers (2004), mapping standards and milestones in their careers as a mandatory requirement for assessment, appraisal and re-validation purposes. This is presently planned for the induction period of a teaching career.

This policy is motivated by previous EU projects: the Inter-competency and Dialogue through Literature (IDIAL), 2008-11(142075-LLP-1-2008-1-BG-COMENIUS-CMP), focusing on the mastery of key abilities for lifelong learning, and the Intercultural Language Learning for Illiterate Adults (ILLIAD),2009-12 (505226-LLP-1-2009-1-BG-KA2NW), targeting language, education and employment issues. Both projects highlight the need for a more robust method of logging continuous development of educator knowledge and skills to monitor suitability for particular job roles. Present professional assessment, appraisal, prescriptive education and training approaches do not acknowledge the expected range of workplace competencies. Together with the question of revalidation, these are common issues across professions and nations. A formal tick-box approach, adopted in present workplace assessments, does not fully reflect abilities.

5. The organisation of the ePortfolio

The ePortfolio has been developed on a Web platform and then piloted across the partnerships after a training session on its use in Sofia, Bulgaria in April, 2013. It has been created from five main fields and employs a grid (Appendix 1) to plot the user's career stage against the four EU principles for qualification and experience. As explained, principles rather than standards are applied to evaluate evidence because

they are fundamental, core values which are unlikely to change. Standards tend to alter over time, reflecting changes in philosophy and practice. An examination of teaching standards across Europe suggests that the four core, EU principles, (*knowledge, continuing personal and professional development, mobility and partnerships*), underpin these and so can be used alongside them by individual countries. The five fields are now elaborated:

i) The role of the creator

This section contains a brief resume of a creator's present role, responsibilities and experiences, reviewing what has been gained from these and presenting a plan for future development in line with personal, professional and workplace goals.

ii) A grid defining principles at early, mid and specialist career levels

This enables individuals to map their career stage to the four EU principles for evaluation of the formal, non-formal and informal evidence that has been selected. Career-stage choice needs a flexible interpretation. For example, a student teacher on a UK university PGCE course was an ex-Army Major and in his probationary year was made Head of Department in a Senior School. Clearly, criteria fitting mid to specialist career stages would be appropriate here, as previous professional experience enabled quick promotion. The grid is available in Appendix 1 and guidelines for use are in Appendix 2 with notes for reference in Appendix 3.

iii) Evidence of formal, non-formal and informal evidence

Portfolios are *representative not comprehensive*, so evidence should reflect significant, relevant aspects of a professional and their teaching and so during a career new material will be included and older information archived. Firstly, focus is on goals and growth towards these and later achievements. Secondly, it is self and collaborative evaluation, meaningful for the teacher and others involved. Finally, it is dynamic assessment with items added or deleted to fit development. Four classes of evidence are chosen with the portfolio creator having ownership of all material and deciding who can have access, at what point and for what purpose.

Documents: such as a curriculum/lesson plan, reflective log, conference/journal review.

Recordings: visual/audio recording of a lesson, meeting, discussion with colleague.

Testimonials: evaluations from colleagues or letters from parents/students

Information links: statement of beliefs, goals, rationale and captions that enable the evidence to be cohered and developed as a narrative of an individual's personal and professional experience

At the pilot stage, it has only been possible to achieve 1-3 pieces of evidence for each section (*formal, non-formal, informal*) but a further stage in development should allow for any possible evidence to be stored and catalogued, with a facility for retrieval to suit the purpose required for assessment, appraisal, interview or re-validation. Experts consider that a career passport could be available, in the near future, on smart phones with button facilities to quickly select the evidence required for a particular purpose.

iv) Witness statements of evidence selected

It is important for validity and reliability to have a witness statement for evidence selected for assessment or evaluation purposes. So, portfolio creators need to get into the habit of securing this for any evidence they wish to store. Although this may seem laborious it is easily and quickly achieved with a format provided for this on the Web platform.

v) Summary of previous learning and experience

Those presenting portfolios for various purposes well into their career will select only what is relevant for current requirements but need to summarise and review previous learning and experience as a context for the present evidence. This is also important for educators who have changed career with relevant previous experience that will enhance their present roles.

6. Evidence from Educator Use in the Partnership Countries

In order to test the validity of the ePortfolio, a platform was developed for public access and the partnership agreed to trial the tool across the six countries involved and aim for 150 teachers to feed back on their use of it in work contexts. Two master teachers from each country were selected for training in Sofia, Bulgaria (April, 2013). This consisted of two days of presentations and practical workshops. A day in schools followed the training, observing classroom practice to consider the evidence that could be collected. The group also participated in seminars with teachers and invited stakeholders, such as Education Inspectors, to discuss the project and receive feedback. The College of Teachers, UK (TCOT) has instituted the ePortfolio policy in its Doctoral Fellowship programme, which aims to encourage innovative practitioners to enhance their status as professional experts and record their experiences in the ePortfolio format for a doctoral qualification at Level 8. (See Appendix 1 for further details of this use).

Feedback from questionnaires received from the Partnerships

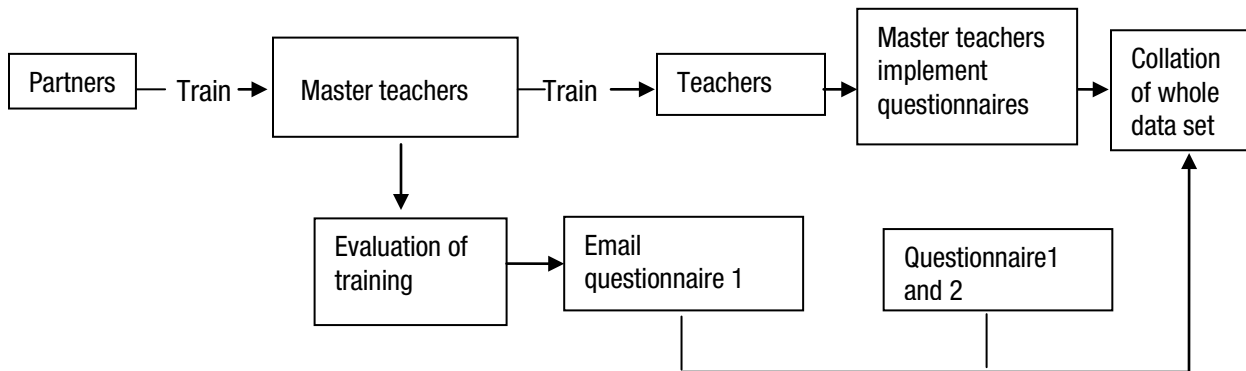
It was agreed at the master teachers' training in Bulgaria that each partner would provide a minimum of 15 persons per country to trial the ePortfolio and complete questionnaires. Examples of questionnaires, one for the training of master teachers and the other for those exposed to the policy and ePortfolio tool in dissemination exercises, are available in Appendix 8. Evaluations of the pilot training of two representatives from each partnership, indicated that it was fit for purpose and so each country was to deliver the package according to their individual possibilities. Actual respondent numbers in the participating countries were:

Bulgaria	54
England: Schools	58
England: Adult trainers	23
Greece	26
Latvia	89
Wales	15
Poland **	3

** (participated in the master teacher training only with dissemination through stakeholder meetings)

Total 268

The process of collecting evidence is presented in the model below:



Model of training and data collection regarding the ePortfolio

Review of evidence from the partnerships

This review provides evaluation of ePortfolio use for tracking careers from a small sample of respondents across Europe. Methods of analysis included face-to-face group and individual discussions with exposure to the ePortfolio for evaluating the tool. A ratings-style questionnaire, with supportive explanations requested, was completed after the master teacher training and from educators, via online questionnaires and dissemination events. Examples are available in Appendix 8, giving a more detailed description of the process, with graphic representation of the data and comment from the participating part

Four key questions sought the following information:

1. The usefulness of an ePortfolio to track a teacher's career. 2. The use of *principles* rather than *standards* for classifying ePortfolio evidence. 3. Whether *formal plus non-formal and informal evidence* provides a more complete view of an educator's knowledge and professional competence. 4. The utility of ePortfolios for annual review, registration, job interview or sharing practice with colleagues to assist development.

Findings suggest that mixed quantitative and qualitative data, collected from questionnaires, capture a deeper understanding of respondent views, especially for triangulating evidence of question interpretation. Results of data analysis show that responses, from partner countries, are positive to the idea of ePortfolios, offering insights into issues that may need resolution, such as a mandatory policy for career tracking and professional, technical support for the process. Core messages from respondents are:

PORTFOLIOS ...

- place responsibility on educators to develop and plan professional goals
- correlate with national and state initiatives for performance-based assessment
- give valuable, all-round information about teacher abilities
- show personal educational philosophies and theories of education
- give opportunity to develop a habit of reflecting on the success/failure of events

- allow grid criteria comparisons over time and across professional experience

The following sections present the findings of the four questions addressed in the data collection:

The utility of an ePortfolio to track a teacher's career

Most respondents believe that an ePortfolio is useful for tracking personal and professional competencies and an effective way to 'capture' and gather career-related evidence. The information can be accessed and stored in one format and updated to track progress when necessary. It retains, retrieves and systemises information with added benefits of video and photographic evidence. For many educators, a positive aspect of completing a portfolio is that it provides motivation and support, with a framework for continual development. There is also the added ability to present work to others and opportunities to build "shared identity". It was noted that educators could update existing portfolios to prepare for events such as interviews or appraisals. Many respondents suggest its utility for raising teachers' self-esteem as well as that of other pedagogic staff, increasing motivation to share innovations.

Respondents mention the benefits of a systematic collection of evidence, ranging from an initial workplace interview to documenting achievements, such as dissertations, reports, publications and awards for university staff research assessment exercises. They suggest that it provides more in-depth information about individual knowledge and skills than a Curriculum Vitae, encouraging an enhanced professional view of teachers. The ePortfolio also promotes standards of practice, giving clarity and structure to professional development. Most respondents said that the ePortfolio gives information about a teacher's real practice and processes in the classroom, providing many aspects about the personal and professional development of someone. Below are quotes from questionnaires:

'The ePortfolio is mobile, allows flexible arranging of the information without unnecessary bureaucracy; it is more ecological'. (Senior teacher, Greece)

'It is useful to have somewhere to record your career progression and ability to update it. However, until it becomes a recognised tool used by employers, will teachers see it as providing real value? (Adult trainer, England)

A negative response suggests that time might be an issue: *the time to complete, coupled with thoughts about employer views on utility*. However, other professional groups note that this is not an issue when the ePortfolio is in use, as the systematic recording of development assists and speeds decision making and work organisation, providing a reference for curriculum and professional planning for oneself and with others (Sage, 2010a).

Respondents frequently identify the ePortfolio as valid for conveying Continual Professional Development (CPD) in a recording framework that assists mobility across Europe. UK teachers also consider the importance of work experience in another country and culture, because of today's global economy and movement of populations. More information is needed on who would have access to the website, such as employers, staff and parents. Recommendations suggest that backing via government and potential employers would be crucial.

Classifying evidence for the ePortfolio using principles rather than standards

Responses for principles, rather than standards, as a way to classify evidence were more positive than negative. Positive responses suggest that the principles were simple, direct, useful, valid and realistic, providing opportunities for career progression (education, training and experiences). Respondents also think that the use of principles is well justified as they encompass fundamental understanding of teaching/teacher development. The online sharing of experience, in regard to evidencing principles should not be underestimated, as it goes beyond boundaries and covers all bases. Addition of “more’ principles have yet to be explored as the following comment suggests:

‘It works well for teaching staff. However, if you want it to be used by all school staff then you may need different categories’ (Special needs teacher, Wales)

However, the portfolio, in its present form, is now being piloted by medical personnel who find the principles relevant for a range of disciplines across professions. The Portfolio, as a career reflection, emphasises personal qualities, which in reference to "development" or "mobility" needs to be clarified for relevance in a specific, work context. In general, it is felt that the portfolio allows for better visibility of teachers’ work and is important for professional qualifications and demonstration of competencies. Categorisation is necessary, but the grid implies a linear progression, which may not reflect reality as competence is not always age/stage related.

Six UK teachers consider the issue of mobility needs discussion. Mobility within one and the same country should be considered but the EU definition refers to experiences across nation states. It is suggested that ‘mobility’ might be interpreted differently by other partner countries and depends on practical possibilities for this.

Continual Professional Development (CPD) in one country can mean a different thing in another. For example, in Bulgaria there is a five stage process for professional development, following initial qualification, which gives value and structure for career progression that is not evident in the UK. Also, Bulgarian teachers keep paper-based portfolios (with individual rather than criterion-referenced evidence) which managers and employers can review. The following comments are from UK questionnaires:

‘I think this may be a good starting point but hearing what employers have to say is perhaps more relevant. I would like to know how much time would be spent by employers evaluating this evidence in an application process’. (Special school teacher, England)

‘What happens if a teacher does not fulfil those requirements? This aspect needs to be clarified’ (Senior school teacher, Wales)

Is professional competence better evidenced using *formal plus non-formal and informal* evidence for a more complete view of an educator's knowledge and ability?

There is a strong sense amongst all respondents that teaching is about far more than formal qualifications. A person may have an impressive list of qualifications but this does not reveal the 'person' or mean they are effective educators as the following comment reveals:

'The formal evidence outlines just the general profile of the teacher, while the non-formal and informal make him/her unique' (University lecturer, Latvia)

Most respondents suggest that it is important to have more than formal qualifications as other evidence of personal knowledge and abilities helps build a better picture of someone. This provides balance and shows a more holistic approach when considering an individual's ability, beliefs, attitudes, values and interests. Otherwise, the viewpoint comes from a limited perspective (e.g. tick-box criteria). However, it is important that the focus does not shift away from teaching and its expected standards. Formal qualifications alone are not a reliable overview as they do not show the breadth of valuable, broader experience as shown in the comment below:

'Formal qualifications do little to guarantee the teaching standards of an individual' (Primary teacher, Bulgaria)

It is classroom management, communicative ability and teaching competence that counts and the ePortfolio allows educators to describe and explain the range of skills needed for their various work roles. Teachers engage in extra-curricular activities to enhance their work and this would give the 'big picture' of someone's personality, characteristics and interests. Educators must use every means to gain knowledge and professional competencies as shown in the comment below:

'I consider it necessary to write down and to present the good personal practices and new methods for improvement of the educational process' (Senior teacher, Greece)

Formal, non-formal and informal evidence provides flexibility to incorporate all types of data and gives an opportunity to upload other employable attributes as these comments suggest:

'I feel it is very important to look at overall skills when ascertaining a teacher's ability and development of teaching' (Senior teacher, Wales)

'I work in adult career advice and have a strong understanding of how employers look for more than 'formal' qualifications as they need to have a way of deciding who and who not to interview' (Adult trainer, England)

Use of an ePortfolio for qualification, annual review, registration, job interview or sharing practice with colleagues as an efficient way to record experience

A variety of responses are given with positive, cautious and developmental comments:

'This is a mobile and interesting variant for virtual communication and sharing of experience' (Teacher trainer, Poland)

As a repository of information, commonly-used media makes sense. This assists teachers in recording developments, within a central resource, and allows access to data for employers and managers to review. Other uses include job interviews, working with colleagues, students and others who need to check qualifications and work history. The universality of the ePortfolio is an important feature if it is to be recognised and accepted throughout the EU. It provides a convenient place to collate on-going continual professional development, showing progression and possibilities to share information as the following comment reveals:

'I think this is an excellent opportunity'. 'I am using it straight away!' 'It is useful to set goals'. (Senior teacher, England)

'The ePortfolio, using teaching principles and including non-formal and informal as well as formal evidence gives a deeper insight into innovation at a doctoral level than criteria for a traditional thesis'. (Doctoral student using the PEEP ePortfolio platform)

The electronic version, therefore, is viewed as a contemporary, flexible use of the portfolio whenever needed, providing a fast update of evidence of experience and abilities for a range of different purposes, including a qualification at doctoral level. However, time constraints are acknowledged. Newly qualified teachers (NQT's) seem likely to buy into ePortfolios more readily, as they are comfortable with this means to record, review and refine experience being part of their own educational process. Teacher trainees indicate that they would use it once they were qualified, indicating that the approach helps to focus on CPD needs and assist in planning careers.

UK Further Education (FE) teachers, qualifying between 2007-2012, when the *Institute for Learning* was the regulatory body, would have been required to submit 30 hours of CPD, annually online. Therefore, they see a need for this activity to be established in professional regulations:

'There may be more local systems in place resulting in duality of information' (Adult trainer, England)

'The ePortfolio would initially be time-consuming and if it is not a requirement it depends on choice'. (Teacher trainer, Latvia)

Such findings suggest that the ePortfolio would only work if all stakeholders were to take it on board and support its use. Many felt it would be used if required by governments and employers:

'It could be a useful in the future but I would like it to be a bit more user friendly and it needs to be recognised across the profession before it is considered to be a really valuable tool' (Senior teacher, Greece)

Comment

There are clearly acknowledged benefits for the principle of an ePortfolio. The responses are very positive. Respondents strongly support a recognised method to show their good practice and feel this would benefit them in a variety of personal, professional ways. Respondents completing hard-copy folders of evidence, when Newly Qualified Teachers (NQTs) feel that an ePortfolio is easier and more manageable. It is encouraging to note responses that say:

'It would be amazing to capture those great teaching moments (as they sometimes get lost) and add to informal or even non formal evidence'. (Primary teacher, Latvia)

The following issues, concerns and recommendations are benefits of gathering qualitative data.

General Issues

An important issue is a need for 'plainer' English instructions for those speaking it as a foreign language. Transferability into other languages, without losing important concepts, needs further review. Ultimately, some teachers may lack motivation. For example, the Latvian cohort feel there is not enough time for international engagement. This is supported by other comments that a lack of motivation to complete ePortfolios may be an issue for those without career ambitions. It is suggested that the tracking system would be applicable if financially supported and part of a registration process. Respondents like the ePortfolio format but feel that uptake depends on the backing of policy makers and influential stakeholders, such as Teacher Unions.

Master teachers' reflections on the policy and ePortfolio pilot activities

Issues regarding the functionality of the ePortfolio portal

Although the ePortfolio portal is designed to apply EU teacher principles for deeper understanding of a future application, it was never intended for this to be the final tool. The Master teachers working with the ePortfolio, provided feedback on its implementation and these insights are useful for future developments. Points raised include:

- the grid is useful but for some their profile fits into different stages for the principles.
- teachers wish to select different stages for principles progress on the grid.
- teachers feel that if collating a lifetime's work ability to catalogue in folders is vital.
- the present portal cannot export data to either PDF, Excel or database files.
- video recording features are not available for all pedagogues.
- interfaces cannot go back to other pages.
- numbers are needed down the side to select an option easily.
- the portfolio needs to be linked to other websites and professional bodies.

It is suggested that youngsters and Career specialists need an ePortfolio to track the acquisition of knowledge and skills for jobs. Therefore, there should be links with other professions, institutes, medics and engineers. This has already happened in the UK, as the ePortfolio policy and tool is being used to track careers of a range of medical professions, in a project sponsored by a drug-producing company. It is felt that threshold applications would be easier in the UK and would be helpful for NQTs.

'The general idea is a very good idea' (School principal, Bulgaria)

'The good pedagogical practice and high professional qualification depend not only on the participation in different qualification forms, but also on the constant implementation of innovations into the practice which requires environment and supporting conditions' (Senior teacher, Bulgaria).

Areas that require further investigation

- other data banks such as Blue Cloud,
- employer views across the range of education institutions
- further discussions with educational providers through conferences/seminars
- further projects to track professional careers for more substantial evidence
- the initiative launched by Tristram Hunt, UK Shadow Education Secretary, recognising the "enormously important" role that teachers play and helping the profession "grow"

'Just like lawyers and doctors they (teachers) should have the same professional standing which means re-licensing themselves, which means continued professional development, which means being the best possible they can be. If you're not a motivated teacher - passionate about your subject, passionate about being in the classroom - then you shouldn't really be in this profession'. Tristram Hunt: Source - BBC News / bbc.co.uk - © [2014] BBC

7. Feedback from Stakeholder Meetings

Meetings involving teachers, trainers, university academics, education inspectors, student parents, education institution governors and union representatives were carried out in conjunction with partnership meetings to give feedback and advice on the progress of the policy and collection of feedback on the ePortfolio use.

There is overall positive feedback about an ePortfolio tracking system as necessary to provide a more complete picture of professional development and available in a practical, portable form. It was generally felt that teaching was behind other professions in providing a comprehensive framework for career progression and the policy provided a way forward.

The benefits articulated at stakeholder meetings are as follows:

- enables a professional focus and targets specific goals that an educator is pursuing
- collection of evidence using *principles* rather than *standards* criteria is more meaningful across cultures to track career progress and assist job applications

- self-audit of required knowledge, competencies, attitudes, achievements and gaps
- repository of resources that can be shared amongst colleagues for group reflection
- encourages organisation of work to demonstrate to potential employers and others
- facilitates personal ownership of professional development
- assists self-monitoring and career planning
- showcases achievements for many purposes – qualification, appraisal, job interviews, staff training
- Improves contact and communication with dispersed colleagues
- enhances achievements to build personal and professional confidence
- may be used to market learning and work-place opportunities
- brings cost benefits through streamlining processes, encouraging efficiency
- provides evidence to showcase educator professionalism and progress

Issues to consider

- training and support are necessary to give confidence in the use of the tool
- computer access problems occur in some areas with low Broadband speeds
- the policy has to be endorsed and made mandatory by all EU countries in order for the career-tracking tool to be adopted widely across the community
- author ownership of content is important with rights to decide who views what evidence
- data protection must be addressed because of ease of hacking into online information

8. Sustainability and Continuation

The PEEP project was designed from the outset with sustainability as a foremost concern. The present platform is externally hosted by the Greek partner and will continue to be available following the end of the project in April 2014. The aim would be to develop the function using a system such as PebblePad or iWebfolio, with abilities to customise the tool and create templates to meet the requirements of professional planning processes. iWebfolio has a smaller range of suggested assets and guided pathways and a more linear process than is implicit in PebblePad. Opinions, however, vary among users and reflect personal views and learning styles.

PebblePad is considered as user friendly and possessing a direct appeal. It has been adopted by the UK Institute for Learning as the basis of its reFLECT system used by FE practitioners to review their professional development. Pebble-Pad's built-in structures and prompts are attractive to some users particularly in relation to some core elements of personal development and action planning, recording of activities and reflecting. Coolin and Cushing (2009) have remarked that cross-referencing criteria with evidence is not easily provided by PebblePad. Such a view must be kept in mind when selecting a permanent system to record professional careers in the future.

9. Links with other online systems

The project has made links with ePIC, a forum for ePortfolio users, and two partners presented papers at the 11th International Conference on **ePortfolio and Identity** in London (2013). The world of ePortfolios is experiencing some interesting changes. One of these is the emergence of Mozilla Open Badges aimed at recognising and celebrating achievements. Free apps, mobile technologies for reflection and ePortfolios for second language learning are now in use. This conference launched EUROPORTFOLIO, a European network of ePortfolio practitioners and experts.

Contacts have also been made with EUROLTA which manages the European Certificate in Language Teaching to Adults. They use Second Life, a virtual 3D environment for training with assessment of formal and informal evidence on a Moodle-based e-learning portfolio. Dr Olga Medvedeva (Lithuania) has been responsible for training teachers for their career tracking and has the following comments to make on such as tool:

- Helps teachers to reflect on their practice and behave differently
- Assists personal confidence with evidence of doing well
- Provides evidence to act as a role model for others

Results of the ePortfolio project with EUROLTA are available on eacea.ec.europa.eu

Appendix 6 describes some users that the partners have made contact with during the life of the project. TRANSit, a project on the didactics and e-assessment of key transversal competencies for those promoting educational change, has formed an associative partnership with PEEP which aims at strengthening sustainability.

10. Conclusion

Educators work with a variety of knowledge types, technology and information. Their education and professional development must equip them to access, analyze, validate, reflect on, transmit and apply knowledge, making effective use of technology when relevant. They must create and manage learning environments and retain the intellectual freedom to make choices over curriculum delivery. Confident use of ICT enables effective integration into learning as educators need to be able to guide and support themselves and their learners in the networks in which information can be found and built.

An ePortfolio is, therefore, an efficient, modern way of tracking the complex career roles and development of educators, enabling them to easily show-case achievements and direct and reflect on their personal and professional development in a lifelong journey. Their practical and theoretical competencies should allow them to learn from their own experiences and match a wide range of learning and teaching strategies for both themselves and their students. A record of experience assists them with such goals, encouraging cooperation and collaboration with other stakeholders in a career continuum which includes initial education, induction and continuing professional development.

Adopting a common approach to an educator's career-tracking across Europe helps to develop greater trust and transparency of qualifications and experience and allows for mutual recognition and increased

mobility. This will assist the development of networks of innovation at local, regional, national and international levels. None of this will be possible, however, without the support of governments and education stakeholders and efforts are being made to engage policy makers and practitioners and make the tool an important part of career tracking for educators working in a wide range of contexts.

11. Main Points on ePortfolios for Educators:

*Records *goals, achievements* and *growth* over time with formal, non-formal and informal evidence of *personal, professional attributes, status, expertise, subject knowledge* and *understanding of learning*

*It has evidence INPUT>OUTPUT>OUTCOME charting personal learning development and growth; showcasing achievements, communicating and marketing them for assessment/evaluation/self-awareness; inspiring/influencing future goal choices and self-fulfilment; reviewing collaboratively for feedback, support and sharing experience

*It is a *process* and *product*, with the *whole* greater than the sum of parts. Merging *self* and collaborative evaluation with products (*evidence*) is more than processes or products alone.

Process – self-examining, reflective, decision-making, goal-setting actions over time in real contexts

Product – the portfolio, itself, preserves and shares work to reflect on the act of teaching

* It enables consistency and transparency of educator qualifications and experience to enable mobility and successfully build the knowledge society for cultural, economic and political viability.

12. Recommendations

a) ePortfolio career-tracking for teachers merits implementation beyond the life of this project, given its unique capacity to bring together relevant colleagues interactively to provide effective developmental support and an efficient evidence record of achievements.

b) The aim is to meet the diversity and mobility needs of lifelong learners, so the provision of single, ePortfolio systems in institutions is not serviceable. Institution-free ePortfolio systems offer immediate advantages and can provide complementary options alongside other recording methods where IT strategies are possible to create links. Current progress in the inter-operability between ePortfolio systems may offer a further alternative.

c) To achieve successful implementation of ePortfolio practice amongst educators in Europe it is essential to bring together policy and practice professionals to enable technical, pedagogical and management support. Sustained input is required from an experienced person able to coordinate e-systems at an effective level and impart specialist understanding of innovative technologies in response to changing demands. Also, teaching staff require a working knowledge of ICT/ILT to have the confidence to use the recording tool.

d) ePortfolios work best when embedded in practice from the outset of teaching training. Ongoing discussion with awarding bodies to achieve a synergy between assessment, monitoring and evidence recording would deliver benefits for continual professional development.

e) In the development of practice with ePortfolios the enrichment of opportunities and experiences will lead to further innovation and not follow it. Also, ePortfolio tools need to be placed within the wider e-learning tool-box (VLEs, assessment tools, web 2.0, virtual worlds, etc.) with which ePortfolios can be made inter-operational if necessary. This will enable choice based on suitability of purpose.

f) Support should be sought following the project end to extend the pilots of ePortfolio-based career tracking for teachers to enhance continual professional development, employability and mobility. At this stage, careful consideration needs to be given to a suitable platform that will be appropriate for all EU states,

* In this document an *educator* is someone acknowledged as having the status of a teacher (or equivalent) at any level and with any activity requiring instruction, guidance and support within the legislation and practice of a particular country. The word “equivalent” acknowledges that in some countries educators have different titles but hold the same status. A teacher could also be a trainer who works with school-age pupils and young adults following vocational programmes in schools, colleges, companies or training organisations. Thus, *educator* encompasses both these roles. In the report the word ‘teacher’ is used to encompass anyone in an educative role.

* Key competences: communication (mother tongue and foreign languages); mathematics, science, technology, digital skill; learning to learn; social and civic skills; initiation and entrepreneurship; cultural awareness.

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14. Useful Texts

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APPENDIX 1: PRINCIPLES GRID

A framework for categorising portfolio evidence to EU principles for teacher competencies and qualifications across a career with examples of evidence. Notes for Doctoral submission (L8)

EU Principles	Early Career Prof Dev (1-5 years)	Mid-Career Prof Dev (5 + years)	Specialist Prof Dev (5+ years with evidence of subject specialism, phase and/or leadership expertise)
Acquisition and Application of Theory and Knowledge	<p>Apply subject/s or knowledge relevant for the career stage to diverse audiences - leading, guiding and supporting learning of oneself and others in the learning environment</p> <p>e.g. Lesson plan + review and reflection (non-formal evidence)</p>	<p>Acquire and apply widening specialist knowledge and problem solving to develop new ideas and initiatives with learners and colleagues</p> <p>e.g. Discussion with colleagues of what has been learnt from a conference/course (informal evidence)</p>	<p>Contribute to critical development and education support by teaching, training, mentoring and managing teams at the forefront of research, work/study contexts</p> <p>e.g. Description of a role in developing others with their reviews of the experience (informal evidence)</p>
Continuing Personal and Professional Development	<p>Responsible for personal and professional development by reviewing and developing performance. Establish effective communication and relationships, leadership and management with students, colleagues and others in the workplace</p> <p>e.g. Review of a work activity, what has been learnt with a development plan to develop further knowledge and skills (non-formal evidence)</p>	<p>Contribute to professional knowledge and/or practice for reviewing performance of self, individuals and groups. Promote positive, effective communicative relations with all education stakeholders in various leadership roles, motivating them to cope with complex, on-going challenges</p> <p>e.g. Presentation at a</p>	<p>Contribute to professional knowledge and practice, reviewing performance of self, teams and learning organisations. Demonstrate commitment and contribution to the development of new ideas /processes at the forefront of research, work or study contexts</p> <p>e.g. A paper at a national/international</p>

		staff meeting of a conference report and how messages can be applied to own context (with handouts counts as non/informal evidence)	conference with an article to the professional press (could count as both non/informal evidence)
Partnerships	Willing to work with others and learn from collaborative experiences within communities and across organisations. e.g. Involvement in a joint enterprise such as a concert, charity event etc. with review and reflection on what has been learnt (informal evidence)	Foster team approaches that enhance roles, improve personal and academic performances by sharing expertise with colleagues in communities e.g. Leading a curriculum planning/school improvement group with action plans, implementation and critical review (non-formal evidence)	Able to plan effective teams, create new strategies and initiatives, ensuring equal opportunities for staff development in different roles within and outside work base, across national and international boundaries e.g. An initiative linked to a national/international activity showing involvement and benefits for institution (non/informal evidence)
Mobility	Identify with multiple stakeholders varying perspectives and show involvement in initiatives that require movement across countries e.g. Participation in a study trip detailing involvement with others and reflection on what has been learnt (informal evidence)	Liaise effectively with colleagues across multiple organisational contexts, developing networks to enhance performance of all. e.g. Membership of a professional organisation + review of benefits. (formal (if qualification achieved + informal evidence)	Develop initiatives across contexts and countries by establishing networks/leading initiatives to enable consistent standards of education across national boundaries e.g. Participation in a project to further knowledge and practice + review of role (informal evidence)

Note evidence can fit more than one category. Non-formal demonstrates greater planning.

DOCTORAL STUDIES (LEVEL 8) BY PORTFOLIO METHOD

Developing your portfolio

1. **Your role description and personal statement:** this should describe your present status and review your personal and professional career focusing on your theme and detailing your experience to provide the context for the collection of evidence.
2. Choose your **theme** which will be the rationale for collecting evidence (*e.g. adult learning*) and provide a definition and a literature base with a critical review of this (around 5,000 words)
3. **Using the above grid:** Your evidence should fit the criteria above at **the specialist level** fitting the four EU principles: **Well qualified** – the formal qualifications you have and how they have contributed to your specialist knowledge; **Continuing Professional Development** - a career plan that illustrates your knowledge, skills and attitude development. (This should be illustrative rather than fully detailed). A final reflection should be made to show how your CPD has impacted on your practice. Evidence to support is a lecture/paper/policy document etc. **Partnerships** – detail the partnerships within and without your work context that illustrate your initiatives and leadership roles. Provide evidence (written, oral (taped interviews), visual (photographs/film)) that demonstrate work within this area. **Mobility** – provide information about your professional links across countries and cultures in exchange partnerships; research and development projects; consultancy work etc.
4. **Evidence** should be substantiated by witness statements with comments of those involved in some way. All evidence supplied should be accompanied by a reflective review that details what has been learnt from the experience and how this might be creatively applied to future activities.
5. **Word length** should be in the region of around 100,000 words but this may include audio/video material.
6. **Organisation** should be clearly defined as in the indicative check-list below. There is no particular format for order as this should reflect how you want to arrange your evidence to tell a coherent narrative that expands your theme.
7. **APEL** may be applicable in certain circumstances where there is evidence of Level 8 studies. This evidence must be supplied with the portfolio.

INDICATIVE CHECK LIST OF ITEMS IN THE PORTFOLIO	Au	T	V	COMMENTS
Contents List				
Role Description of the author and personal statement				
Definition of the portfolio theme with reference to literature				
Overview of your evidence with reference to the grid and rationale of the theme used as the focus for <i>formal, non-formal and informal</i> evidence - illustrating principles of being <i>well-qualified, showing continual professional development, partnerships and mobility</i>				
Formal evidence: qualifications				
Non-formal evidence: planned activities reflecting specialist level				
Informal evidence: unplanned as in description of a project role				
Reflection on evidence				
Witness Status List (verifiers of the evidence)				
1. Portfolio Plan (Agree and review possible opportunities for collecting evidence with Tutor - identified and evaluated against the relevance and appropriateness of professional principles to author needs)				
2. Tutor's checklist (outlining duties) Final assessment checklist (outlining principles to be assessed)				
3. Questions for the author to consider on Portfolio Evidence (used as an assessment method)				
4. Author Report on Tutor Feedback throughout the process				
5. Author Progress Record (copy)				
KNOWLEDGE EVIDENCE				
Summary of Knowledge Evidence (this may be applied from study)				
Confirmation of author's Underpinning Knowledge (achieved from questions on the portfolio theme)				
RECORD OF ACHIEVEMENT (may include APEL in certain cases)				
Reflection on the portfolio evidence and what has been learnt and how the knowledge, skills and attitudes will be applied in the future				
Literature consulted during the period of study (Harvard style)				

KEY: Au – AUTHOR; T – Tutor; V – VERIFIER

APPENDIX 2: ePORTFOLIO GUIDELINES

1. Introduction

These guidelines are intended for use by teachers and educators who wish to prepare and maintain a professional ePortfolio.

Section 1 explains in basic terms what a ePortfolio is, the benefits of maintaining one and the uses to which it may be put. Section 2 provides instructions for teachers and educators in how to use the PEEP (Policy for Educator Evidence in Portfolios) ePortfolio system.

SECTION 1

2. What is an ePortfolio?

An ePortfolio is a collection of records and materials that are gathered over time and that you consider are relevant in illustrating your expertise and competence. By regularly **updating, reviewing and reflecting** on your ePortfolio, you can use it in a number of ways, for example:

- to help you to reflect on and plan your career and personal and professional development;
- to help you to identify your strengths and build on your weaknesses;
- to draw evidence which you can use when applying for jobs, seeking promotion, demonstrating that you have met certain professional standards or competencies or for your annual performance review;
- to draw evidence which you can use when applying for and undertaking professional/academic training and study;
- to demonstrate continued competence in your post and career.

3. What should I include in my ePortfolio?

Your ePortfolio could contain anything that you consider relevant to your professional life. However, it is advisable to be selective when deciding what to include in your ePortfolio rather than recording absolutely everything that you do. The list below is by no means exhaustive, however records, information and documents which you might choose to include are:

- Documents, such as:
 - a chronology of your employment, professional development and key achievements to date;
 - information and evidence towards professional standards or competencies;
 - projects and initiatives you have been involved in and attendance at key meetings and events;
 - lesson observations and analysis;

- your professional development plan and performance appraisals;
 - innovative lesson plans;
 - journal articles you have written or professional reading and research you have undertaken;
 - policies or action plans you have developed;
 - a reflective commentary on any activity undertaken;
- Recordings and reflections, such as presentations you have made at a conference, key meetings with colleagues or your reflections following the introduction of a new initiative or teaching technique which has had a positive impact on pupil learning and achievement;
 - Testimonials, including certificates, employer references, commendations for work, letters from parents/pupils;

As well as the information you choose to include in your ePortfolio, it is equally important to ensure that your ePortfolio is well organised as this will help you to get the most benefit from it.. The ePortfolio provides a framework to help you to organise your records, information and documents effectively.

4. Who should have access to your ePortfolio?

Your ePortfolio is owned by you and you are entitled to decide whether or not anybody else should look at it or be provided with any of its contents. It is important that teachers can develop their ePortfolios with confidence, knowing that their records and reflections will remain confidential if they so choose.

5. The importance of self-reflection

To gain the maximum benefit from maintaining an ePortfolio, you are encouraged to critically and analytically reflect on your career as it progresses and on any professional development you undertake (regardless of whether this is formal or informal or non-formal). In doing so, you should aim to identify the learning points from any activity you undertake in order to facilitate further personal and professional growth. The process of self-reflection is covered in the reference notes but if you need assistance with this, you are encouraged to seek specific advice and support.

APPENDIX 3: REFERENCE NOTES FOR ePORTFOLIO USE

A CAREER PORTFOLIO FOR TEACHERS (Extended Notes for Reference)

Contents of a professional portfolio

1. Introduction
2. What is a Portfolio?
3. The Portfolio for Assessment, Appraisal, Registration
4. Summary of information included
5. Note on the APEL section
6. How to use the portfolio
7. Possible uses of a portfolio
8. Portfolio requirements
9. Peer support
10. Reviewer support
11. Explanation of the terminology used in portfolio compilation
12. Questions regarding practical concerns
13. Issues that have emerged from previous authors of portfolios

Appendices:

A. Framework for the contents list

B. Assessment guide-lines

C. Useful References

1. Introduction:

When confronted with assembling a professional portfolio questions spring to mind of the *what, why, when, how* variety. These guidelines clarify such queries and assist those charged with presenting or assessing portfolio evidence to understand what is required of each other.

2. What is a Portfolio?

A portfolio is a collection of materials that records and reviews a learning and professional journey, providing a synopsis of experiences and development. It is a live resource used to support present and future learning enabling reflection on academic and practical achievements as well as feedback from colleagues. Such a record assists coherence of personal progress from a broad view of what has been accomplished and what needs further attention. It presents a particular cross section of learning as, for example, the development of key, transferable abilities through a personal development plan. The collection is in a constant state of flux so requiring careful organising and indexing. Such information is increasingly important as evidence for **Continuing Professional Development** in many professions.

Continuing implies ongoing learning regardless of age or seniority; **Professional** focuses on progress in a professional role; **Development** defines a plan to improve performance and enhance career progression.

In a portfolio, one may supply notes, video/photographic images*, papers, case studies, personal and/or professional plans etc. which are appropriate for specific working needs. These elements can be synthesised into reports, critiques, designs, proposals, reflections or any other document relating to personal goals and growth. It is possible to reject or archive material as already used or no longer relevant. The portfolio can be thought of as a glorified *work diary* representing current reflections along with feedback by colleagues or clients (*students, parents*). There is an emphasis on analysis of issues, evaluation and reflection with supporting evidence rather than a collection of materials with brief commentary.

3. The Portfolio for evaluation

An essential element in a portfolio for evaluation is the commentary and reflection on what is presented as well as a review of the author's development. This should include a demonstration of how feedback has been used, combined with further study to advance knowledge and understanding. Those viewing the portfolio will be discussed with the author at the outset as personal reflections can be a sensitive issue. Presentation is important and standard formats for reports and reflections assist this and can be supplied for computer use as a means of reporting. Information should be word processed with brief comments from the author/ mentor/tutor/appraiser on review meetings included. A professional standard is expected in line with the content list and sufficient annotation supplied to make sense of what is included. Assessment involves marking by an assessor and verifier if a portfolio is used for professional development/qualification plus discussion with questions and feedback from this experience included in the final evidence.

4. Summary of information included

- Role statement and status of those signing off evidence if used for assessment/appraisal
- A chronological collection of materials, cross-referenced/indexed to EU principles:
 - **Well-qualified:** requiring extensive subject and pedagogic knowledge to guide and understand student physical, mental, emotional, social needs.
 - **Lifelong learners:** needing continual knowledge and skill updating
 - **Mobility:** working/studying in other EU states to enhance professional experience
 - **Partnership:** working collaboratively with all stakeholders for maximum results.
- An APEL report with commentary and evidence showing how principles/outcomes have already been achieved
- A journal reflecting on work done and reviewed
- Evidence to emphasise cognitive development (e.g. document/article review)
- Demonstration of subject-specialist learning and reflection on use in practical contexts
- Reviews from the author, colleagues, tutors/appraisers on activities completed

5. Note on accredited prior education and learning (APEL) section if used for a professional qualification

An APEL section is usually considered as a claim that certain requirements have been met. These requirements can be expressed as learning outcomes, assessment criteria, professional competencies or other forms. The APEL statement is a useful basis for considering the personal plan to meet role requirements. In assessing the credibility of past academic achievements and experience, a Registrar and Awards Administrator is consulted with expertise of international standards of qualifications across the world.

6. How to use the portfolio

- To share learning as it is taking place promoting dialogue on progress and plans
- Demonstration that planned objectives/competencies have been met
- APEL report detailing prior learning and experience to gain exemption from study/practical placements, providing the basis for a personal development plan
- Career statement used to substantiate present status
- CPD report and plan to demonstrate possible progression for appraisal/job interview

7. Possible uses of a portfolio

- A *process* enabling learning to be shared, promoting dialogue on plans and progress
- A *demonstration* that planning learning objectives or competencies have been met
- An *APEL report* presenting prior learning and experiences for a personal learning plan and to gain exemptions from study and/or practice towards a professional qualification
- A *career statement* demonstrating continuing professional development for the purposes of registration, membership, licensing or job interview

Although these are the main uses of a portfolio they are not mutually exclusive and a purpose in compilation may be to meet more than one of these. However, there needs to be discussion on the purpose/s and the relationships between types of portfolio and applications required. A portfolio, therefore, provides a coherent collation and analysis of sources, thoughts, work in progress, finished work and feedback from peers, mentors and tutors. It is a valuable vehicle to share learning and progress as well as giving and receiving feedback. As a snapshot of a current state of knowledge, understanding and performance it is more illuminating than a mark or grade as a record of achievement, showing stages of progress allowing tutors to provide more specific feedback. Not only does it reflect current capabilities but shows ability to learn from experience and feedback. Increasingly portfolios provide a solid base for an interview conversation whether for further education and training or employment in a particular role. The portfolio follows candidate interest and trails of enquiry and as a personal document has lasting value.

8. Portfolio requirements

It is important to be clear about the exact requirements about the portfolio. They include:

- **Schedules:** Review and hand-in dates are in line with course requirements and Boards of Study meetings if a portfolio is contributing to a further qualification
- **Size:** Portfolios for assessment should not be unwieldy and conciseness and clarity are important criteria.
- **Presentation:** easy removal and insertion of materials are an effective and efficient collecting mode on a suitable e-learning platform (archive irrelevant material)
- **Basic Items:** For example, these include a description of present role plus academic and practical experience to date; a contents page; an index; mapping to Standards/domains.

It is also important to be clear regarding what is not fixed. Innovative and experimental forms, such as videos or photographs may be included but if identifiable people and places are presented permission must be granted from appropriate sources and included in the portfolio appendix in line with Data Protection procedures.

9. Peer support

Other colleagues completing portfolios can be very helpful in reviewing and feeding back constructively on work in progress. They will do this more successfully if they understand that evaluation is not competitive and that this sharing experience can enhance the final outcome. Opportunities to meet and talk about progress sparks off new thinking and ideas and most of us need this to keep strongly motivated!

10. Mentor support

Mentors rarely have time to give constant feedback on successive drafts of work. Early feedback, therefore, is essential to check work is on the right track. Prompt steering and encouragement is vital as few people will have put together portfolios before and naturally are apprehensive about the process.

11. Explanation of the terminology used in portfolio compilation

Evidence: This can comprise appropriate reports, papers, notes, action plans, meeting agendas, meeting minutes, etc. as well as possible work completed for study (e.g. a case study of a situation). Included can be material not produced especially for the portfolio. The author is main judge of appropriateness with advice and recommendations from others. For example, you may specify *how many pieces of evidence* are needed to show outcome or goals achieved. Some items may need to be excluded due to their confidential or sensitive nature and this needs discussion with managers in line with procedures for data protection. In any event specific references to people and places should not be made and alternative names supplied in accordance with ethical guidelines.

Annotation: Most items need annotating to make clear what the evidence is and what it shows. It should show a) what it is; (b) by whom; (c) when (d) why it was produced; (e) what the item is intended to show,

such as goals achieved or problems solved, development or learning progression undertaken, and (f) keywords or indexing terms to annotations.

Critical reflection: This involves taking a step back from the evidence to analyse the totality of it or particular subsets. A critique presents strengths and weaknesses of the information and what it means to the author and what has been learnt in producing it as well as how it has affected subsequent work, thought and action. The author may demonstrate how their thinking led to, rather than followed, from the compilation of evidence and how this has modified performance and led to changes in practice. A critical reflection may also relate what the author has done, produced and learnt in relation to goals set.

There are **three kinds of reflection** underpinning academic and professional practice. For example, the author may interview someone for the purpose of gaining specific information from them. After completing this task, they review how well the activity went, how successfully it achieved what was required and why. This is generally known as *reflection on action* whereby we monitor progress and adjust activity. Along with professional knowledge, *reflection in action* is core to practice whereby we describe the moment-to-moment processes that monitor progress and allow adjustments to what is done. *Reflection for action* evolves from reviewing and learning from previous activities to inform future planning. Each of these three types of reflection can be demonstrated and evidenced with their effects presented within the portfolio.

Goal-setting: Before reflection and action comes planning. This evolves in response to the question: *What am I trying to achieve?* The result of this is the setting of goals or steps to produce a final result. Useful questions to help with this activity are:

What have I learnt from previous study and experience that is helpful to the present task?

How can I apply what I have already learnt to this task?

In reviewing progress regarding the set goals the following questions are useful:

Have I achieved what I set out to do?

What aspects have been achieved and not achieved? In each case WHY?

Reflection in action is difficult to demonstrate and depends on rationalisation after the event. The *process* as well as the *product* of the activity must be reviewed. For example, if the process was an interview to gain information from someone, a *transcript* of this could be annotated showing analysis, confirmation or suggested change to either ratify or revise the activity for future use. If a *project* has been undertaken, then a journal would describe the events, views of appropriateness and how approaches might be changed for a better outcome. A journal is a useful medium for showing *reflection in action*.

Structure: The portfolio structure must be clear and explicit, following guidelines so that everyone can find their way around the materials. A contents list provides signposts for this. There are many ways to organise the materials and the contents list demonstrates the overall framework. Within this, materials can be organised by:

Time: showing work development and capabilities, weekly/monthly during the completion process.

Individual items: each with associated preparation – outline, drafts, feedback and review in the form of comments from the author and colleagues

Theme: the main topic: under this may be themes such as *communication, networking, curriculum planning etc.*

Assessment criteria addressing the Standards/domains for their achievement within agreed contexts and experiences

Index: At a minimum, an index to the main content is indicated unless the function is adequately met by the contents list, which details the information clearly. A well-structured portfolio is organised and sequenced according to the overall framework structure so enabling the content to be interrogated in various ways. Check this with questions: Where in the portfolio can I find everything about topic X?... everything about the author?...feedback from people on the work?...the finished work produced?

Mapping: The key requirements are specified in an enclosed table showing what these are and where they are located in the portfolio. This summarises the main arguments and issues raised and why the items taken together prove what they are intended to prove about development and achievement. *A particular piece of evidence can often show that more than one assessment requirement is met.* The mapping document lists all the key requirements addressed and demonstrated. Alongside each item in this list is a note of the places from across the portfolio where the supporting evidence and critical reflection are found. In addition, the author's account of how each item and the sum total of evidence together show how the assessment requirements have been met provides a valuable additional element. In writing this self-assessment the author synthesises and critiques their learning and this exercise prompts high-quality and valuable work and makes the assessment role easier and more interesting.

12. Questions that can arise regarding practical concerns

Is it possible to see exemplars? In an initial phase of implementation only a mock-up portfolio is possible. In allowing access to other portfolios, the Data Protection Act applies and permission must be sought and names and specific information made anonymous. This may not be practicable. For authors in employment a portfolio may contain confidential information. On balance allowing access to other portfolios to see the range, type, content and quality with comment can be useful once problems of personal information are solved.

Can work already assessed in another context be included?

Work previously assessed may be included to show progress or as material used to develop new ideas or practices. The status of this material must be made clear.

Can work by other people be included?

It may be valuable to critique and use ideas, information and materials from other sources but these should be acknowledged and referenced as in academic work. If evidence is included from collaboration a portfolio statement should detail the author's contribution to the activity and reflect on this. It is usual to have a statement from contributing personnel for a consistent account.

How is the portfolio assessed?

Two assessors, closely involved in management, would be used if the portfolio was presented for professional qualification. The intended learning outcomes and assessment criteria to be applied to the portfolio should be included. As portfolios include personal information, authors have a right to know who will view it.

13. Issues that have emerged from previous authors of portfolios

Authors of portfolios often feel nervous because they are inexperienced in this method of recording and are aware that much is at stake. A full briefing is essential that emphasises why they are asked to produce a portfolio whilst stressing the benefits. Reasons seem obvious but need spelling out to others. It is useful to encourage them to find the author's own reasons to become active rather than compliant partners in the process. If there is access to others who have used this method it is invaluable to hear their experiences. In the briefing, it is important to explain and explore goals and growth and what professional Standards mean in practice. Time and effort is required to internalise requirements and what these mean in work terms. Continuing conversations while the portfolios are in progress is essential to the success of the enterprise.

APPENDICES

A. Framework for the contents list (Au=portfolio author; A= assessor; V=verifier)

PORTFOLIO EVIDENCE OF PERFORMANCE AND KNOWLEDGE IF USED FOR ASSESSMENT

ITEMS IN THE PORTFOLIO	Au	A	V	COMMENTS
Contents List				
Role Description of the author				
Description of evidence (to assess performance and knowledge)				
Covering: Overview of role and experience				
Performance criteria from principles (GRID)				
PERFORMANCE CRITERIA				
Summary of Evidence (listed activities)				
Witness Status List (those signing evidence)				
1. Assessment Plan (Agree and review possible opportunities for collecting evidence - identified and evaluated against the relevance and appropriateness of principles for author needs)				
Assessor's checklist (outlining duties if relevant)				
Assessment checklist (outlining principles to be assessed)				
3. Questions for the author on Portfolio Evidence (used as an assessment method for the Portfolio)				
4. Author Report on Assessor's Feedback				
5. Candidate Progress Record (copy)				
Summary of Evidence from Achievements (suitable prior evidence)				
KNOWLEDGE EVIDENCE				
Summary of Knowledge Evidence (this may be applied from study)				
Confirmation of author's Underpinning Knowledge (achieved through topic questions that have the same format for all candidates for across-subject consistency if used for a qualification)				
RECORD OF ACHIEVEMENT (List any accredited prior learning/experience that is being used)				
PROFESSIONAL PRINCIPLES (headings with different levels of assessment according to career role/stage)				
Description of Knowledge, Skills and Performance areas in the Standards (clarifying detail of the Standards)				

KEY: Au – AUTHOR; A – ASSESSOR; V – VERIFIER

ASSESSING PRINCIPLES USING DIFFERING SOURCES OF EVIDENCE

1. JUDGING EVIDENCE AND PROVIDING FEEDBACK:

Performance and Knowledge required from Portfolio Assessors

Performance Criteria

1. Advice and encouragement to collect evidence efficiently for candidate needs.
2. Access to assessment appropriate to candidate needs.
3. Valid evidence according to candidate needs.
4. Only criteria specified in principles grid and the career stage at which it is assessed is used to judge evidence.
5. Evidence is judged accurately against all relevant performance criteria.
6. When evidence of prior achievement/ learning used, check that relevant principles for career stage are achieved
7. Evidence is judged fairly and reliably by trained assessors and verified correctly.
8. Difficulties in authenticating and judging evidence are referred to the appropriate authority promptly.
9. When evidence is not to the principles grid, the candidate is given a clear explanation and appropriate advice.
10. Feedback following decision is clear, constructive and appropriate to person's level of confidence and needs.

Range Statements

Evidence derived from:

Natural performance; simulations (if appropriate); projects and assignments; questioning; candidate and peer reports; prior achievements

Evidence used for:

Own judgements; judgements by other people

Candidates:

Experienced/inexperienced in presenting evidence; candidates with special assessment requirements (e.g. disability/ESL etc.)

Performance required:

In respect of evidence judgements covering specified sources (described in range)

- A. Records of evidence considered and judgements made.
- B. The way an assessor makes judgements and provides informal/formal feedback.

Knowledge required:

1. Ways of encouraging persons with differing levels of confidence and experience to take an active part in assessment.
2. Different candidate needs and their relevance to providing fair, reliable assessment.
3. What are the professional principles and how to judge evidence against them fairly and reliably?
4. What are evidence requirements and how to identify this in various contexts?
5. Why it is important to make an accurate judgement against all relevant criteria for the professional principles?
6. Why it is important to make an accurate judgement against only the criteria specified for certification?
7. Ways of checking the validity and authenticity of evidence, particularly from products (e.g. written information).
8. How to administer pre-set simulations/tests and communicate the portfolio purpose.
9. How to collect and interpret evidence unobtrusively by observation.
10. Types of difficulty which may occur in making fair and reliable judgements of evidence.
11. Types of special assessment requirements available; provision for them; advice on implementation.
12. What are the differing sources of possible evidence and how to use these to provide the required information?

2. MAKING ASSESSMENT DECISIONS USING DIFFERING SOURCES OF EVIDENCE and PROVIDING FEEDBACK**Performance criteria**

1. A decision is based on all relevant, available evidence.
2. Inconsistencies in evidence are clarified and resolved.
3. When combined evidence covers range, performance criteria and evidence specification - person informed speedily
4. When evidence is insufficient, a candidate is given clear explanation and advice.
5. Feedback following decision clear, constructive and appropriate to person confidence and personal/professional needs.
6. A candidate is encouraged to seek clarification and advice from relevant experts.
7. Evidence and assessment decisions are recorded to meet verification requirements.
8. Records are accurate, stored securely and recorded for certification promptly.

Range Statements**Records of:**

Assessment decisions; evidence.

Candidates:

Experienced/inexperienced in presenting evidence; candidates with special assessment requirements (e.g. disability / ESL).

Evidence:

Sufficient to make a decision; insufficient to make a decision; own judgements; judgements made by other people.

Evidence derived from:

Natural performance; simulations (if appropriate); projects and assignments; questioning; candidate and peer reports; prior achievements

Performance required:

Records of assessment evidence and decisions related to the principles grid
The way the assessor gives feedback to the candidate.

Knowledge required:

1. What are the professional principles and how to assess fairly and reliably against them?
2. What evidence is available and how to assess this fairly and reliably.
3. How to make consistent assessment decisions.
4. How to give constructive feedback to candidates according to the decision taken.
5. How to adapt feedback to differing levels of confidence and experience in candidates.
6. Different types of advice and how to offer it constructively and in ways that allow choice.
7. How to record and process assessment decisions.
8. What are the requirements of the verification process?

3. AGREEING AND REVIEWING AN ASSESSMENT PLAN**Performance criteria:**

1. Opportunities for collecting evidence are identified and evaluated with relevance to professional principles and needs
2. Evidence collection is planned to make effective use of time and resources.
3. The opportunities selected provide access to fair and reliable assessment.
4. The proposed assessment plan is discussed and agreed with the candidate and relevant others.
5. If disagreement with proposed assessment plan, options open are explained clearly and constructively.
6. Assessment plan specifies professional principles and career stage clarifying opportunities for efficient evidence collection, assessment methods, timing and arrangements for reviewing plans.
7. Requirements to assure the authenticity, reliability and sufficiency of evidence identified.
8. Plans are reviewed and updated at agreed times to reflect the candidate's progress towards certification.

Range Statements

Opportunities for collecting evidence from:

Natural performance; simulations (if appropriate); projects and assignments; questioning; candidate and peer reports; achievements

Evidence used for:

Own judgements; judgements by other people

Candidates:

Experienced/inexperienced in presenting evidence; candidates with special assessment requirements (e.g. disability/ESL etc.)

Performance required

Assessment plans covering the professional principles and evidence for these.

Knowledge required

1. How to meet candidate needs for fair and reliable assessment in line with relevant legislation and ethical guidelines.
2. How to recognise and eliminate unfair discrimination.
3. What are the different opportunities for evidence collection and how to evaluate relevance and appropriateness?
4. How to collect evidence cost effectively and efficiently.
5. Ways of developing and agreeing assessment plans relevant to different types of candidates and their needs.
6. How to obtain candidate and others' agreement to assessment plan so process is facilitative, offering authentic choice.
7. What types of special assessment requirements there are with provision and advice on implementation

E. Useful References

Assessment in Higher Education: Politics, Pedagogy and Portfolios (1993)

P. Courts, K. McInerney, Connecticut: Westport Praeger

Teaching and Its Predicaments (1997), Chapter 8. 'The Complexities of Portfolio Assessment. N.

Burbules, D. Hansen, Boulder: Westview Press

Assessing portfolios (1999) R. Ward (Ed.), Baume, York: The LTSN Generic Centre

Centre for Recording Achievement Website: www.recordingachievement.org.uk

APPENDIX 4: EUROPEAN QUALIFICATIONS FRAMEWORK

RECOMMENDATIONS (*Resolutions, recommendations and opinions*)

EUROPEAN PARLIAMENT COUNCIL

RECOMMENDATION OF THE EUROPEAN PARLIAMENT AND OF THE COUNCIL (23 April 2008) on the establishment of the European Qualifications Framework for lifelong learning (Text with EEA relevance)

(2008/C 111/01)

THE EUROPEAN PARLIAMENT AND THE COUNCIL OF THE EUROPEAN UNION,

Having regard to the Treaty establishing the European Community, and in particular Article 149(4) and Article 150(4) thereof, Having regard to the proposal from the Commission, having regard to the opinion of the European Economic and Social Committee (1), **Having regard to the opinion of the Committee of the Regions (2), Acting in accordance with the** procedure laid down in Article 251 of the Treaty (3), Whereas:

(1) The development and recognition of citizens' knowledge, skills and competence are crucial for the development of individuals, competitiveness, employment and social cohesion in the Community. Such development and recognition should facilitate transnational mobility for workers and learners and contribute to meeting the requirements of supply and demand in the European labour market. Access to and participation in lifelong learning for all, including disadvantaged people, and the use of qualifications should therefore be promoted and improved at national and Community level.

(2) The Lisbon European Council in 2000 concluded that increased transparency of qualifications should be one of the main components necessary to adapt education and training systems in the Community to the demands of the knowledge society. Furthermore, the Barcelona European Council in 2002 called for closer cooperation in the university sector and improvement of transparency and recognition methods in the area of vocational education and training.

(3) The Council Resolution of 27 June 2002 on lifelong learning (4) invited the Commission, in close cooperation with the Council and Member States, to develop a framework for the recognition of qualifications for both education and training, building on the achievements of the Bologna process and promoting similar action in the area of vocational training.

(4) The joint reports of the Council and the Commission on the implementation of the 'Education and Training 2010' work programme, adopted in 2004 and 2006, stressed the need to develop a European Qualifications Framework.

(5) In the context of the Copenhagen process, the conclusions of the Council and the representatives of the governments of the Member States, meeting within the Council of 15 November 2004 on the future

priorities of enhanced European cooperation in vocational education 6.5.2008 EN Official Journal of the European Union C 111/1 (1) OJ C 175, 27.7.2007, p. 74. (2) OJ C 146, 30.6.2007, p. 77.

(3) Opinion of the European Parliament of 24 October 2007 (not yet published in the Official Journal) and Council Decision of 14 February 2008. (4) OJ C 163, 9.7.2002, p. 1 and training gave priority to the development of an open and flexible European Qualifications Framework, founded on transparency and mutual trust, which should stand as a common reference covering both education and training.

(6) The validation of non-formal and informal learning outcomes should be promoted in accordance with the Council conclusions on common European principles for the identification and validation of non-formal and informal learning of 28 May 2004.

(7) The Brussels European Councils of March 2005 and March 2006 underlined the importance of adopting a European Qualifications Framework.

(8) This Recommendation takes into account Decision No 2241/2004/EC of the European Parliament and of the Council of 15 December 2004 on a single Community framework for the transparency of qualifications and competences (Europass) (1) and Recommendation 2006/962/EC of the European Parliament and of the Council of 18 December 2006 on key competences for lifelong learning (2).

(9) This Recommendation is compatible with the framework for the European Higher Education Area and cycle descriptors agreed by the ministers responsible for higher education in 45 European countries at their meeting in Bergen on 19 and 20 May 2005 within the framework of the Bologna process.

(10) The Council conclusions on quality assurance in vocational education and training of 23 and 24 May 2004, Recommendation 2006/143/EC of the European Parliament and of the Council of 15 February 2006 on further European cooperation in quality assurance in higher education (3) and the standards and guidelines for quality assurance in the European Higher Education Area agreed by the ministers responsible for higher education at their meeting in Bergen contain common principles for quality assurance which should underpin the implementation of the European Qualifications Framework.

(11) This Recommendation is without prejudice to Directive 2005/36/EC of the European Parliament and of the Council of 7 September 2005 on the recognition of professional qualifications (4), which confers rights and obligations on both the relevant national authority and the migrant. Reference to the European Qualifications Framework levels on qualifications should not affect access to the labour market where professional qualifications have been recognised in accordance with Directive 2005/36/EC.

(12) The objective of this Recommendation is to create a common reference framework which should serve as a translation device between different qualifications systems and their levels, whether for general and higher education or for vocational education and training. This will improve the transparency, comparability and portability of citizens' qualifications issued in accordance with the practice in the different Member States. Each level of qualification should, in principle, be attainable by way of a variety of educational and career paths. The European Qualifications Framework should, moreover, enable

international sectoral organisations to relate their qualifications systems to a common European reference point and thus show the relationship between international sectoral qualifications and national qualifications systems. This Recommendation therefore contributes to the wider objectives of promoting lifelong learning and increasing the employability, mobility and social integration of workers and learners. Transparent quality assurance principles and information exchange will support its implementation, by helping to build mutual trust.

(13) This Recommendation should contribute to modernising education and training systems, the interrelationship of education, training and employment and building bridges between formal, non-formal and informal learning, leading also to the validation of learning outcomes acquired through experience.

(14) This Recommendation does not replace or define national qualifications systems and/or qualifications. The European Qualifications Framework does not describe specific qualifications or an individual's competences and particular qualifications should be referenced to the appropriate European Qualifications Framework level by way of the relevant national qualifications systems.

(15) Given its non-binding nature, this Recommendation conforms to the principle of subsidiarity by supporting and supplementing Member States' activities by facilitating further cooperation between them to increase transparency and to promote mobility and lifelong learning. It should be implemented in accordance with national legislation and practice.

(16) Since the objective of this Recommendation, namely the creation of a common reference framework serving as a translation device between different qualifications systems and their levels, cannot be sufficiently achieved by the Member States and can therefore, by reason of the scale and effects of the action envisaged, be better achieved at Community level, the Community may adopt measures, in accordance with the principle of subsidiarity as set out in Article 5 of the Treaty. In accordance with the principle of proportionality as set out in that Article, this Recommendation does not go beyond what is necessary in order to achieve that objective,

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(1) OJ L 390, 31.12.2004, p. 6.

(2) OJ L 394, 30.12.2006, p. 10.

(3) OJ L 64, 4.3.2006, p. 60.

(4) OJ L 255, 30.9.2005, p. 22. Directive as amended by Council Directive 2006/100/EC (OJ L 363, 20.12.2006, p. 141).

HEREBY RECOMMEND THAT MEMBER STATES:

1. use the European Qualifications Framework as a reference tool to compare the qualification levels of the different qualifications systems and to promote both lifelong learning and equal opportunities in the knowledge-based society, as well as the further integration of the European labour market, while respecting the rich diversity of national education systems;

2. relate their national qualifications systems to the European Qualifications Framework by 2010, in particular by referencing, in a transparent manner, their qualification levels to the levels set out in Annex

II, and, where appropriate, by developing national qualifications frameworks in accordance with national legislation and practice;

3. adopt measures, as appropriate, so that, by 2012, all new qualification certificates, diplomas and 'Europass' documents issued by the competent authorities contain a clear reference, by way of national qualifications systems, to the appropriate European Qualifications Framework level;

4. use an approach based on learning outcomes when defining and describing qualifications, and promote the validation of non-formal and informal learning in accordance with the common European principles agreed in the Council conclusions of 28 May 2004, paying particular attention to those citizens most likely to be subject to unemployment or insecure forms of employment, for whom such an approach could help increase participation in lifelong learning and access to the labour market;

5. promote and apply the principles of quality assurance in education and training set out in Annex III when relating higher education and vocational education and training qualifications within national qualifications systems to the European Qualifications Framework;

6. designate national coordination points linked to the particular structures and requirements of the Member States, in order to support and, in conjunction with other relevant national authorities, guide the relationship between national qualifications systems and the European Qualifications Framework with a view to promoting the quality and transparency of that relationship. The tasks of those national coordination points should include:

(a) referencing levels of qualifications within national qualifications systems to the European Qualifications Framework levels described in Annex II;

(b) ensuring that a transparent methodology is used to reference national qualifications levels to the European Qualifications Framework vocational education and training institutions, social partners, sectors and experts on the comparison and use of qualifications at the European level.

ENDORSE THE COMMISSION'S INTENTION TO:

1. support Member States in carrying out the above tasks and international sectoral organisations in using the reference levels and principles of the European Qualifications Framework as set out in this Recommendation, in particular by facilitating cooperation, exchanging good practice and testing — *inter alia* through voluntary peer review and pilot projects under Community programmes, by launching information and consultation exercises with social dialogue committees

— and developing support and guidance material; work in order to facilitate comparisons between them on the one hand, and ensuring that the resulting decisions are published on the other;

(c) providing access to information and guidance to stakeholders on how national qualifications relate to the European Qualifications Framework through national qualifications systems;

(d) promoting the participation of all relevant stakeholders including, in accordance with national legislation and practice, higher education and

2. establish, by 23 April 2009, a European Qualifications Framework advisory group, composed of representatives of Member States and involving the European social partners and other stakeholders, as

appropriate, responsible for providing overall coherence and promoting transparency of the process of relating qualifications systems to the European Qualifications Framework;

3. assess and evaluate, in cooperation with the Member States and after consulting the stakeholders concerned, the action taken in response to this Recommendation, including the remit and duration of the advisory group, and, by 23 April 2013, report to the European Parliament and to the Council on the experience gained and implications for the future, including, if necessary, the possible review and revision of this Recommendation;

4. promote close links between the European Qualifications Framework and existing or future European systems for credit transfer and accumulation in higher education and vocational education and training, in order to improve citizens' mobility and facilitate the recognition of learning outcomes. Done at Strasbourg, 23 April 2008.

For the European Parliament: The President, H.G. PÖTTERING For the Council: The President, J. LANARČIČ
6.5.2008 EN Official Journal of the European Union C 111/3

ANNEX I

Definitions

For the purposes of the Recommendation, the definitions which apply are the following:

(a) 'qualification' means a formal outcome of an assessment and validation process which is obtained when a competent body determines that an individual has achieved learning outcomes to given standards;

(b) 'national qualifications system' means all aspects of a Member State's activity related to the recognition of learning and other mechanisms that link education and training to the labour market and civil society. This includes the development and implementation of institutional arrangements and processes relating to quality assurance, assessment and the award of qualifications. A national qualifications system may be composed of several subsystems and may include a national qualifications framework;

(c) 'national qualifications framework' means an instrument for the classification of qualifications according to a set of criteria for specified levels of learning achieved, which aims to integrate and coordinate national qualifications subsystems and improve the transparency, access, progression and quality of qualifications in relation to the labour market and civil society;

(d) 'sector' means a grouping of professional activities on the basis of their main economic function, product, service or technology;

(e) 'international sectoral organisation' means an association of national organisations, including, for example, employers and professional bodies, which represents the interests of national sectors;

(f) 'learning outcomes' means statements of what a learner knows, understands and is able to do on completion of a learning process, which are defined in terms of knowledge, skills and competence;

(g) 'knowledge' means the outcome of the assimilation of information through learning. Knowledge is the body of facts, principles, theories and practices that is related to a field of work or study. In the context of the European Qualifications Framework, knowledge is described as theoretical and/or factual;

(h) 'skills' means the ability to apply knowledge and use know-how to complete tasks and solve problems. In the context of the European Qualifications Framework, skills are described as cognitive (involving the use of logical, intuitive and creative thinking) or practical (involving manual dexterity and the use of methods, materials, tools and instruments);

(i) 'competence' means the proven ability to use knowledge, skills and personal, social and/or methodological abilities, in work or study situations and in professional and personal development. In the context of the European Qualifications Framework, competence is described in terms of responsibility and autonomy. C 111/4 EN Official Journal of the European Union 6.5.2008.

ANNEX II

Descriptors defining levels in the European Qualifications Framework (EQF)

Each of the 8 levels is defined by a set of descriptors indicating the learning outcomes relevant to qualifications at that level in any system of qualifications Knowledge Skills Competence In the context of EQF, knowledge is described as theoretical and/or factual. In the context of EQF, skills are described as cognitive (involving the use of logical, intuitive and creative thinking) and practical (involving manual dexterity and the use of methods, materials, tools and instruments). In the context of EQF, competence is described in terms of responsibility and autonomy.

Level 1

The learning outcomes relevant to Level 1 are basic general knowledge basic skills required to carry out simple tasks work or study under direct supervision in a structured context.

Level 2

The learning outcomes relevant to Level 2 are basic factual knowledge of a field of work or study basic cognitive and practical skills required to use relevant information in order to carry out tasks and to solve routine problems using simple rules and tools work or study under supervision with some autonomy.

Level 3

The learning outcomes relevant to Level 3 are knowledge of facts, principles, processes and general concepts, in a field of work or study a range of cognitive and practical skills required to accomplish tasks and solve problems by selecting and applying basic methods, tools, materials and information, take responsibility for completion of tasks in work or study, adapt own behaviour to circumstances in solving problems.

Level 4

The learning outcomes relevant to Level 4 are factual and theoretical knowledge in broad contexts within a field of work or study, a range of cognitive and practical skills required to generate solutions to specific problems in a field.

of work or study, exercise self-management within the guidelines of work or study contexts that are usually predictable, but are subject to change, supervise the routine work of others, taking some responsibility for the evaluation and improvement of work or study activities.

Level 5 (*)

The learning outcomes relevant to Level 5 are comprehensive, specialised, factual and theoretical knowledge within a field of work or study and an awareness of the boundaries of that knowledge a comprehensive range of cognitive and practical skills required to develop creative solutions to abstract problems exercise management and supervision in contexts of work or study activities where there is unpredictable change review and develop performance of self and others.

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Level 6 (**)

The learning outcomes relevant to Level 6 are advanced knowledge of a field of work or study, involving a critical understanding of theories and principles, advanced skills, demonstrating mastery and innovation, required to solve complex and unpredictable problems in a specialised field of work or study, manage complex technical or professional activities or projects, taking responsibility for decision making in unpredictable work or study contexts take responsibility for managing professional development of individuals and groups.

Level 7 (***)

The learning outcomes relevant to Level 7 are highly specialised knowledge, some of which is at the forefront of knowledge in a field of work or study, as the basis for original thinking and/or research, critical awareness of knowledge issues in a field and at the interface between different fields specialised problem-solving skills required in research and/or innovation in order to develop new knowledge and procedures and to integrate knowledge from different fields, manage and transform work or study contexts that are complex, unpredictable and require new strategic approaches, take responsibility for contributing to professional knowledge and practice and/or for reviewing the strategic performance of teams.

Level 8 (****)

The learning outcomes relevant to Level 8 are knowledge at the most advanced frontier of a field of work or study and at the interface between fields the most advanced and specialised skills and techniques, including synthesis and evaluation, required to solve critical problems in research and/or innovation and to extend and redefine existing knowledge or professional practice demonstrate substantial authority, innovation, autonomy, scholarly and professional integrity and sustained commitment to the development of new ideas or processes at the forefront of work or study contexts including research.

Compatibility with the Framework for Qualifications of the European Higher Education Area

The Framework for Qualifications of the European Higher Education Area provides descriptors for cycles. Each cycle descriptor offers a generic statement of typical expectations of achievements and abilities associated with qualifications that represent the end of that cycle.

(*) The descriptor for the higher education short cycle (within or linked to the first cycle), developed by the Joint Quality Initiative as part of the Bologna process, corresponds to the learning outcomes for EQF level 5.

(**) The descriptor for the first cycle in the Framework for Qualifications of the European Higher Education Area agreed by the ministers responsible for higher education at their meeting in Bergen in May 2005 in the framework of the Bologna process corresponds to the learning outcomes for EQF level 6.

(***) The descriptor for the second cycle in the Framework for Qualifications of the European Higher Education Area agreed by the ministers responsible for higher education at their meeting in Bergen in May 2005 in the framework of the Bologna process corresponds to the learning outcomes for EQF level 7.

(****) The descriptor for the third cycle in the Framework for Qualifications of the European Higher Education Area agreed by the ministers responsible for higher education at their meeting in Bergen in May 2005 in the framework of the Bologna process corresponds to the learning outcomes for EQF level 8.

C 111/6 EN Official Journal of the European Union 6.5.2008

ANNEX III

Common Principles for QA Higher and Vocational Education and Training in the context of the European Qualifications Framework

When implementing the European Qualifications Framework, quality assurance - which is necessary to ensure accountability and the improvement of higher education and vocational education and training - should be carried out in accordance with the following principles:

- quality assurance policies and procedures should underpin all levels of the European Qualifications Framework,
- quality assurance should be an integral part of the internal management of education and training institutions,
- quality assurance includes regular evaluation of institutions, their programmes, QA systems by external monitoring bodies/ agencies,
- external monitoring bodies or agencies carrying out quality assurance should be subject to regular review,
- quality assurance includes context, input, process and output dimensions, emphasising outputs and learning outcomes,
- quality assurance systems should include the following elements:
 - clear, measurable objectives and standards, implementation guides, including stakeholder involvement, appropriate resources, evaluation methods,
 - feedback mechanisms and procedures for improvement,
 - widely accessible evaluation results,

- quality assurance initiatives at international/national/regional level, coordinated to ensure overview, coherence, synergy and system-wide analysis,
- quality assurance- cooperative across education/training levels and systems, involving stakeholders, within Member States and across Community,
- quality assurance at Community level provide reference points for evaluations and peer learning.
 - EN Official Journal of the European Union C 111/7

APPENDIX 5: DEFINITIONS¹

For the purposes of this recommendation, the following definitions shall apply:

(a) Formal learning takes place in an organised and structured environment, dedicated to learning, and typically leads to the award of a qualification, usually in the form of a certificate/diploma. This includes the systems of general education, initial vocational training and higher education.

(b) Non-formal learning concerns learning that takes place through planned activities (in terms of learning objectives, learning time) where some form of learning support is present (e.g. student-teacher relationships). It may cover programmes to impart work-skills, adult literacy and basic education for early school leavers. Very common cases of non-formal learning include in-company training, through which companies update and improve the skills of their workers such as ICT skills, structured online learning (e.g. by making use of open educational resources), and courses organised by civil society organisations for their members, their target group or the general public.

(c) Informal learning results from daily activities related to work/family/leisure. It is not organised or structured in terms of objectives, time or learning support. Informal learning may be unintentional from the learner's perspective. Examples of learning outcomes acquired through informal learning are skills from life/work experiences. Examples are project management skills/IT skills acquired at work; languages and intercultural skills acquired abroad; ICT skills acquired outside work, skills from volunteering, cultural activities, sports, youth work and home activities (e.g. child care).

(d) A qualification means a formal outcome of an assessment and validation process obtained from a competent body to given standards

(e) Learning outcomes are statements of what a learner knows, understands and is able to do, defined in terms of knowledge, skills and competencies.

(f) A national qualification framework is a coherent and comprehensive description of qualification levels based on learning outcomes.

(g) Validation is a process of confirmation by an authorised body that an individual has acquired learning outcomes measured against a relevant standard. It consists of 4 phases: (1) identification through dialogue of particular individual experiences, (2) documentation – to make visible the individual's experiences – (3) a formal assessment of experiences and (4) recognition leading to a certification - a partial/full qualification.

¹ From the Proposal for a **COUNCIL RECOMMENDATION on the validation of non-formal and informal learning**, Brussels, 5.9.2012, COM(2012) 485 final

¹ From the Proposal for a **COUNCIL RECOMMENDATION on the validation of non-formal and informal learning**, Brussels, 5.9.2012, COM(2012) 485 final

APPENDIX 6: EXAMPLES OF EXISTING EPORTFOLIO SYSTEMS

CLePD The Centre for International ePortfolio Development

Mahara Portfolios

This is an open source ePortfolio and community web application that allows users to create and maintain a digital record of their development. It is also has social networking/community features which enable interaction with other users. Mahara includes blogs, a resume builder, a file manager and a 'page' creator which helps users arrange their content to share with others.

www.nottingham.ac.uk/eportfolio

CREATE Life Long Learning Programme to Validate Informal Learning

This is a model and toolkit for the validation of informal learning. There is a manual produced for practitioners describing how the products can be used to recognise informal evidence.

www.create-validate.org

EPOS- ePortfolio System for Autonomous Learning

ePortfolios are increasingly used to support self-directed development and foster knowledge and skills. It supports the whole development chain from independent self-evaluation of existing competencies via the determination of one's own objectives and the reduction of deficits to the documentation of outcomes. It assists strategies and methods of development. It has been particularly used for foreign language learning but is being applied more generally for CPD.

Contact: Professor J. Friedrich (TZI) friedrich@uni-bremen.de

LiveText Analytics

This provides self-service access to explore data interactively, perform data mining, and generate custom reports to explore trends. It gathers data to make continuous improvement decisions and therefore, is a useful tool for reviewing information.

www.livetext.co.uk

MEPS ePortfolio for multilingual/multicultural Learning

This targets the visibility and recognition of the specific nature of academic communication competence in relation to employability enabling the monitoring of development and the production of a personal profile with formal, non-formal and informal evidence. www.magicc.eu

Open Badge Factory System for Creators and issuers of Open Badges

This has been developed by the Mozilla Foundation with a cloud-based service called Open Badge Factory to enable organisations to create and manage their own badges in a central repository in order to reward achievements. www.discendum.com

SOS Network for Social Inclusion

This is a Pan-European Network for people involved in Vocational Education, Training and Social Inclusion. www.sosnetwork.eu

TRANSit ePortfolios to Develop Key Competencies

Transversal key competencies for lifelong learning are developed and recorded on an ePortfolio system which aims to raise awareness and encourage effective teaching.

www.transit-project.eu

APPENDIX 7: TEACHER TRAINING STANDARDS ACROSS THE PARTNERSHIPS

COUNTRY	STANDARDS				
	Occupational standards for teachers	A career span	Evaluation	A model of competence	Comments
BULGARIA	<p>Professional teachers' needs: a Bachelor or Master's degree in (Mathematics, Literature, etc...).</p> <p>To become a fully qualified teacher a course is taken within a university context. The requirements include as a mandatory minimum:</p> <p>A/ Theory</p> <ol style="list-style-type: none"> 1. Pedagogy and didactics – 60 lectures; 2. Psychology (general, developmental and pedagogic psychology) - 45 lessons in schools 3. Audio Visual and ICT in education – 15 lectures 4. Teaching Methodology in - 60 lectures. <p>B/ Practice</p> <ol style="list-style-type: none"> 1. Observing – 30 lessons in schools 2. Current pedagogic 	<p>Career development and assessment of in-service teachers was introduced in 2009:</p> <p>Junior teacher, Teacher, Senior Teacher Head Teacher, Teacher-Methodologist.</p> <p>Concerning the assessment of teachers, each school appoints a commission who decides job criteria based on work requirements and carries out the evaluation which is connected to rises in salary. The system is debated and criticised for lacking objectivity, coherence and consistency.</p>	<p>Criteria for in-service teachers:</p> <ul style="list-style-type: none"> - Data from external evaluation of students from national exams - Outstanding student results - Working with special needs/ minority students - Feedback from parents - Extracurricular work - Documentation <p>This system is considered unreliable and subjective.</p> <p>A new law is soon expected, changing the philosophy of</p>	<p>New instruments are being developed and will become Law.</p> <p>5 stages of CPD following initial qualification</p>	<p>New standards taking into account EU requirements are being developed.</p> <p>A working group in the Ministry of Education is working on a National Recording Portfolio format. The results are not yet published.</p>

	<p>practice – 45 lessons 3. Pre - graduate practice – 75 lessons.</p> <p>A final complex, theoretic-practical exam. The examiners are a commission of 3 people, with the presence of a practicing teacher obligatory.</p> <p>The above does not refer to <i>primary and kindergarten teachers</i> and to ‘pedagogists’ who are trained in special Faculties and Departments with a accredited specialist curriculum.</p> <p>The requirements for employment are stipulated by law and include a degree and the award of the teacher professional qualification. There must be no criminal record to be employed.</p>	<p>The portfolio career record is a popular format for demonstrating personal achievement but is school-based with a great variety of approaches.</p>	<p>attestation and assessment of in- service teachers. The DRAFT of the new educational Act envisages:</p> <ul style="list-style-type: none"> - Regular attestation every 4 years - Professional profiles (in process of development) - Lifelong annual registration - 48 hours for an attestation period - Commitments of the IState and licensed organisations for providing courses - Elaboration of the credit system, certification - Professional qualification degrees awarded by HEIs 		
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<p>ENGLAND</p>	<p>Teachers reach “Qualified” status based upon a Bachelors degree, or other recognised education qualification for their initial role in the classroom. Training takes place in a university for a Post-Graduate Certificate in Education (PGCE)/ employment-based method for Qualified Teacher Status (QTS)</p> <p>The Teach First Programme is a 2-year school-based training programme for top honours graduates, designed to deliver social and economic change by addressing educational disadvantage, through placements at schools in challenging circumstances.)</p> <p>Teachers serve a probationary year in schools, following QTS and are required to study on courses designed by their Local Education Authorities. Successful completion of the year enables teachers to register with the Ministry of Education and so become fully qualified.</p>	<p>Each teacher is expected to demonstrate career progression. Opportunities are available for various post-graduate qualifications through universities and HEIs. . However, none are “required knowledge for teacher progression although to achieve a Head of Department or above a Masters Level 7 would be normally required. The senior staff team decides training budgets and investment in individual teacher development based on assumed learning needs.</p>	<p>National examining bodies for academic qualifications decide initial education. Further to this there are no standards specified but schools are expected to deliver a continuing professional development programme for staff. There may be level-setting per subject to ensure that course work is marked to a similar standard across schools. This operates for the Standards Assessment Tasks taken at age 7, 11 and 14 and GCSE and A level examinations. The latter is about to become the English Bac from 2013.</p>	<p>It is not specified.</p>	<p>Every teacher must understand the importance of the context in which learning takes place. Teacher training must be about helping them to create learning contexts that address the needs of students.</p> <p>There is concern that since the National Curriculum was introduced in 1989, teacher training has concentrated on how to implement this rather than on the psychology of learning and teaching.</p>
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	<p>From September 2013, teacher training is the responsibility of schools registered to deliver this rather than universities or HEIs.</p> <p>Further to this, teachers are expected to participate in a broad spectrum of education initiatives via “In-Service Training” (Inset) days as determined by their school’s administration (Head teacher, senior teachers, etc).</p>		<p>There is a national school inspection process known as OFSTED and schools are visited by teams to report on standards. Schools not operating to national standards are put into special measures with a schedule for improvement and more regular inspections.</p>		
GREECE	<p>In Greece, teachers receive their initial education, specialising in 1 discipline (e.g. Physics, Chemistry, Arts). They study for 4 years (8 semesters) in a university department. There is no specialisation year or courses in didactics for the subject domain. According to the Law, the holder of a degree has to participate in specific national examinations in order to be appointed as a teacher in secondary education. The</p>	<p>A teacher can advance to Head Teacher. For a teacher to be promoted as Head a decision by a Commission is made, according to set criteria.</p> <p>Opportunities for participation in professional development activities (MSc studies, seminars) exist with the Teaching Efficiency, Administration –</p>	<p>Teacher appraisal systems do not presently exist. Criteria for teacher evaluation are in official guidelines by the Ministry of Education on Professional Development. At present, the Ministry of Education is developing an evaluation strategy that will begin in</p>	Not specified	

	<p>candidate takes a assessment in the subject domains (e.g. Physics, Chemistry, Language, Arts) and another one in didactics. A similar procedure is followed for the appointment of all primary school teachers. According to a new Law (2010), all graduates have to follow until 2014 a specific 6 month PGCE programme focusing on the pedagogy of the subject field in order for them to be able to participate in National Contests for teacher appointments.</p> <p><u>Teacher continuing training in PEKs (Regional Training Centres)</u></p> <p>Universities can participate in the continuing training of in-service teachers through the following channels:</p> <ul style="list-style-type: none"> ● A university professor /group of professors could submit 2-3 month training programmes in one or more Regional training Centres (PEKs). If a programme is chosen 	<p>Management – Human Relationships,</p> <p>General Attitude provision of job leave (see last bullet in previous column).</p>	<p>2013.</p>		
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	<p>by a sufficient number (15+) of teachers of a PEK region, it can then be implemented.</p> <ul style="list-style-type: none"> ● University professors can be trainers in the programmes of a Pedagogical Institute (PI) and for actions provided by the National Strategic Reference Framework (2007-13) and the European Social Fund (2007-2013). E.g. the action titled: "Teacher training for exploitation of Information and Communication Technologies in instruction and learning", (350 hours for in-service teachers). In-service ICT-related training is offered to teachers in 2 consecutive programmes (Level 1 and 2 ICT training). ● After 5 years of continuous employment, a teacher can take an examination for a Post-Graduate Diploma (Master or PhD) in a university education or subject specific department. 				
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<p>LATVIA</p>	<p>Latvia values teaching qualifications very highly and upholds strict requirements. Since 2004, an amendment to Latvia's Education Law stipulates that all teachers (including preschool instructors) must have third-level qualifications (LV0409102F). There is decree of the Cabinet of Ministers No 347 of 3/10/2000, where requirements for teacher qualifications are specified. After studies in an integrated model of learning and teaching, in accordance with the Latvian Law, the student is awarded the Professional Bachelor's degree in Education Sciences plus qualification in a specific subject/ subjects - (16- credit points , 4 years of study). After study, in a consecutive model, the student is awarded first the Bachelor's degree in a specific branch of science (120 credit points, 3 years of study). The student then has a possibility to continue studies in a professional</p>	<p>Latvia has begun implementing a system of qualification ranking for teachers, which seeks to foster career development, as well as to bring remuneration in line with a level of qualification.</p> <p>The career development model for teachers is a system for evaluating teacher quality, taking account of rank, evaluation criteria, evaluation procedures and a teacher's professional experience.</p> <p>Teacher participation in the new professional evaluation system is voluntary, but will grant them one of the 5 qualification levels. For the time being, the number of qualified teachers and their levels will not impact on a school's ranking</p>	<p>A 3-level system of evaluation: 1) Evaluation at institutional level (by a Commission in school); 2) At municipal level; 3) At state level</p>	<p>Not officially specified. There are projects for a competence model in ICT education, Mathematics and Physics education, but these are initiated by individual schools.</p>	
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	<p>programme (40-60-80 credit points, 1 - 1½ - 2 years); the Masters pedagogy and psychology cycle; methods of subject teaching and teaching practice to receive a qualification in a respective subject</p>	<p>in the accreditation process (assessment of school quality). However, the allocated level will define a teacher's progress up the career ladder and may affect remuneration.</p> <p>The Ministry of Education and Science proposes a basic wage complemented by qualification bonuses. 70% of the basic wage is fixed and 30% adjustable depending on qualification level.</p> <p>A qualification level is granted for a period ranging from 2-6 years. Teachers who have not completed a qualification assessment are eligible to receive the basic wage and a bonus for length of service. Teachers can choose the level they wish to apply for, although</p>			
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		<p>young ones need 3-5 years school experience before applying for the 4th/5th level. It is not mandatory for a teacher to pass through all of the levels starting from the lowest. It is possible to apply for a qualification suitability evaluation starting at the highest rank</p>			
POLAND	<p>After graduating from university (MA or BA) a teacher is employed as:</p> <p>-An intern – after a probationary year s/he gains a position of a contracted teacher</p> <p>-Public sector employee (specified contract)</p> <p>In order to become a – Career civil servant appointed teacher (a tenure,) s/he has to have:</p> <ul style="list-style-type: none"> - 2 years break --+ 3 years’ practice - Pass an examination in front of a Commission: A representative of a: - Supervising institution 	<p>A teaching career develops in accordance with the standards described.</p>	<p>Periodically, the school manager must evaluate the work of each teacher. This is done with a Teacher’s Union Representative (qualitative, descriptive assessment) The commission completes the evaluation according to standard procedures.</p>	<p>Yes, at least in theory.</p>	<p>A need to complete a number of certificates makes some teachers concentrate on taking a number of courses which gain them points, at the expense of their regular teaching. In consequence, this means some good teachers are not promoted.</p>

	<ul style="list-style-type: none"> - School Governor - School Chairman; - 2 experts appointed by Ministry of Education and Child-rearing <p>To become a Certified Teacher s/he must have 3 years' practice + 2 years break:</p> <ul style="list-style-type: none"> -Pass an examination in front of a Commission: A representative of a: <ul style="list-style-type: none"> - Supervising institution - School Governor - School Chairman; - 3 experts appointed by Ministry of Education and Child-rearing. 				
WALES	<p>All teaching candidates must hold qualifications at the A level standard or equivalent, with a grade C or higher in English and Mathematics. Following a recent consultation by the Welsh Government, this requirement is expected to change to a minimum grade B in English and Mathematics at GCSE level. All students undergoing Initial Teacher Education in Primary Education will</p>	<p>To teach in State or Grant-Maintained schools, you must have a degree and qualified teacher status (QTS). Most teaching staff in Independent schools and Colleges also have QTS. QTS is obtained by undertaking an Initial Teacher Education and is awarded by the General Teaching Council for Wales</p>	<p>The examining bodies for academic qualifications decide upon the initial education. Further to this there is no specific standard in general. There may be level-setting per subject to ensure that course work is marked to a similar</p>		<p>A new route into teaching, based on the English Teach First Programme is being adopted in Wales. (Teach First is a two-year training programme for very good honours graduates, designed to deliver social and economic change by addressing educational disadvantage through placements at schools in challenging</p>

	<p>have to study some Welsh but do not necessarily need to have a prior knowledge.</p> <p>Graduates from other disciplines may apply to follow the employment-based Initial Teacher Training route – known as the Graduate Teacher Programme (GTP) – but numbers undertaking this route remain small. For 2011/12, there were approximately 30 funded GTP places available for secondary teaching and 30 funded primary places.</p>	<p>(GTCW) on behalf of the Welsh Assembly Government.</p> <p>After obtaining QTS (Qualified Teacher Status), a teacher is required to complete a period of Statutory Induction - a period of professional development and reflection under guidance from a mentor which will lead to achieving the Practising Teacher Standard.</p> <p>From September 2012, the Welsh Government has introduced the Masters in Educational Practice for newly qualified teachers.</p>	<p>standard across schools. This is particularly for the Standards Assessment Tests and GCSE and A Level public examinations.</p>		<p>circumstances.)</p>
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APPENDIX 8: EXAMPLES OF DATA GIVING FEEDBACK ON THE ePORTFOLIO

Examples show how data was collected and analyzed. Two questionnaire examples are also shown. The first is from the training of Master teachers who then mentor those using the ePortfolios. The second is given to a range of teachers through presentations, workshops and online contact for them to take back to collect and report views from colleagues on the questionnaire.

WALES: Brynmawr School, Hydref 2013

After travelling to Sofia, Bulgaria in April 2013, the information gathered from the PEEP Master Teachers' training conference was brought back to Wales and disseminated to other educators in the school. The following is a summary of the work that took place and the findings.

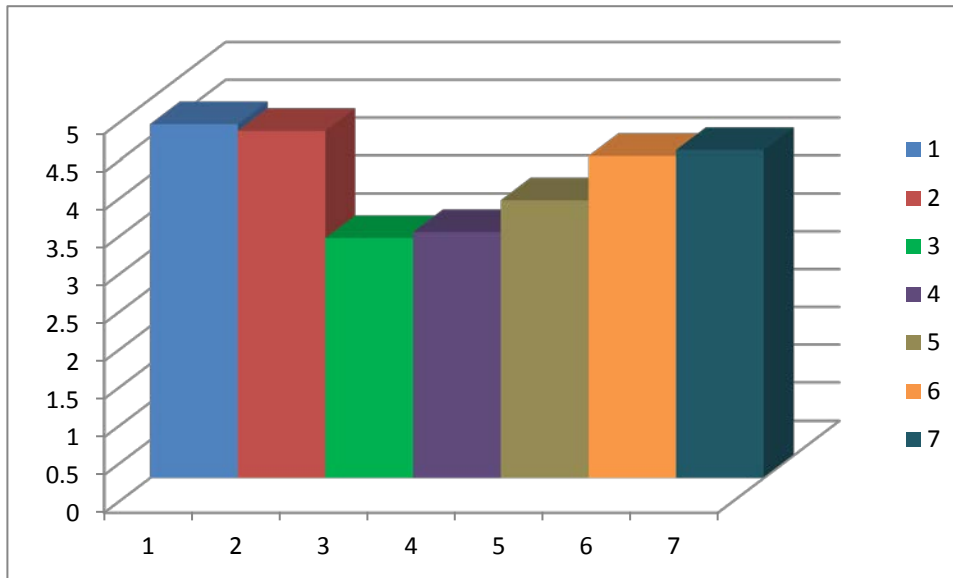
Methodology

The whole school staff were introduced to PEEP in a morning briefing session of 25 minutes. After the initial meeting, staff were encouraged to receive further individual instruction in using the tool to evidence their practice, to go away and use the tool themselves and to complete a follow up questionnaire about thoughts on the tool and the process.

12 educators have received the further training and completed the questionnaire.

Results from Final Questionnaire

Question Number	Total (12 Respondents)	Mean Score	Standard Deviation
1	56	4.67	0.49
2	55	4.58	0.51
3	38	3.17	0.93
4	39	3.25	1.21
5	44	3.67	0.78
6	51	4.25	0.45
7	52	4.33	0.78



Responses for Individual Questions

1. The mean score for question 1 was very high with a low standard deviation. It was straight forward for respondents to understand the aim of the testing phase.
2. The mean score for question 2 was very high with a low standard deviation. Typical comments were, “Self-explanatory” and “Easy to use”.
3. The mean score for question 3 was relatively low with a higher standard deviation. The instruction was given on an individual basis but some respondents did not get as much practice as they would have liked when they went away to use the tool on their own. Typical responses referred to time being an issue in general, although, people did not feel that the tool itself was particularly time consuming.
4. The mean score for question 4 was relatively low with a high standard deviation. There was a large disparity between the confidence levels of respondents. Those with lower scores typically gave responses such as, “I would feel more confident if I had more practice.”
5. The mean score for question 5 was relatively low with a standard deviation that was the median value. Most respondents found the grid useful but some commented that their profile fitted into different stages for different principles and for different strands within those principles.
6. The mean score for question 6 was high with a low standard deviation. Respondents could see the benefits of using the ePortfolio but many felt that they would be much more likely to use it if its completion was expected of educators and it were recognised by employers and the Government.
7. The mean score for question 5 was high with a standard deviation that was the median value. Most respondents could see the benefits of the ePortfolio and would be happy to use it.

Conclusions

The response to the ePortfolio was very positive. The respondents were keen that there was a recognised mechanism for them to show their good practice and felt that they would use it. Those who had

completed hard-copy folders of evidence when they were Newly Qualified Teachers (NQTs) felt that an ePortfolio would be easier and more manageable. Respondents said that they would like to be able to select different stages for different principles and strands and that this might be represented visually on the Grid to show progress in different areas. The use of folders within the evidence banks was another issue raised. Respondents felt that if they would ultimately be collating a lifetime of work then being able to catalogue it effectively would be vital. Respondents liked the ePortfolio but felt strength would come from expectation and recognition of its use.

QUESTIONNAIRE 1: REVIEW OF A TEACHING SESSION ON AN ePORTFOLIO FOR THOSE USING THE ePORTFOLIO PLATFORM TO RECORD FORMAL, NON-FORMAL, INFORMAL EVIDENCE

Please circle your rating in accordance with the following evaluation:

1 - Not at all 2 - Partly 3 - Difficult to say 4 - To a large extent 5 - Entirely

An important section of the review is the "Explain.." section. Please take a little time to explain your ratings.

1. Do you understand your role in the testing phase?

Rating 1, 2, 3, 4, **5** – circle your rating with 5 as the highest. Explain...

The teacher training on the ePortfolio was excellent. It was clear, interactive and presented in an interesting way

2. Did you have sufficient information on how to USE the ePortfolio?

Rating 1, 2, 3, 4, **5** – circle your rating with 5 as the highest. Explain...

There was full information, based on literature knowledge that gave a rationale and instructions for ePortfolio use.

3. Do you feel you've had sufficient practice in using the ePortfolio?

Rating 1, 2, 3, **4**, 5 – circle your rating with 6 as the highest. Explain...

Given time to work on it – this was valuable as it was good to be able to work alongside others for support.

4. Do you feel prepared to teach others "how to use the ePortfolio"?

Rating 1, 2, **3**, 4, 5 – circle your rating with 6 as the highest. Explain.

Although it was explained well to me, I would need further training/support before delivering to others at this stage.

5. Do you think that the grid - principles and career stages - is useful for classifying evidence?

Rating 1, **2**, 3, 4, 5 – circle your rating with 6 as the highest. Explain.

It was very helpful and a useful framework – but wordy and at times not clear.

6. Would you use the ePortfolio for annual appraisal/registration/job interview /sharing practice?

Rating 1, 2, **3**, 4, 5 – circle your rating with 6 as the highest. Explain.

If it was something widely used in all LAs then yes, within my own school, as the HT is aware of it I would

use it as part of Perform/Management/Appraisal.

7. Has the training convinced you of using the ePortfolio?

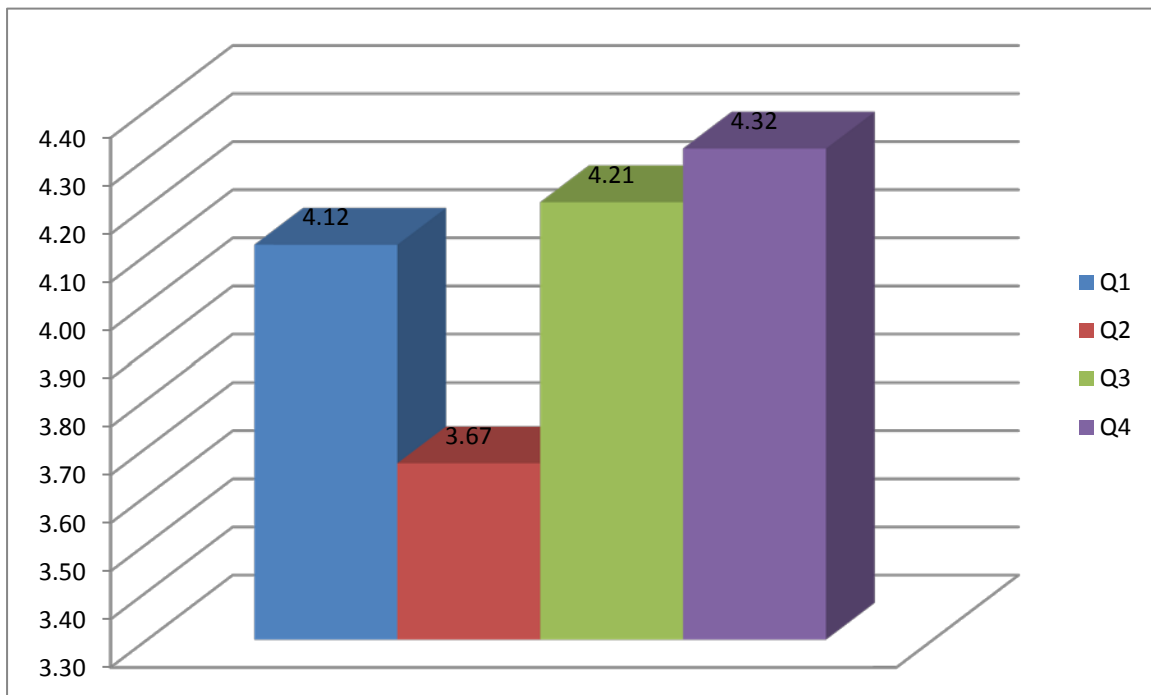
Rating 1, 2, 3, 4, 5 – circle your rating with 6 as the highest. Explain.

Yes – if it was widely used by all

BULGARIA: Using ePortfolio for tracking teachers' career

Feedback from participants at the Annual Pedagogical Forum organised by the Department for Information and In-service Teacher Training at *Trakia University* in Stara Zagora (Bulgaria) on 20 June 2013

General overview



The chart shows the average results of the rate given from 34 respondents for each of the four questions in the questionnaire where 1 meant “not at all” and 5 meant “entirely [agree]”. After the Summary below you will find a comprehensive list of all comments provided by the respondents in addition to the rating.

Summary

Participants attended the key conference speech on the PEEP Policy and a further practical engagement in two workshops. These workshops were preceded by a presentation on the Bulgarian context for PEEP and workshop 1 enabled teachers to engage in various types of reflection in practical tasks and workshop 2 considered the principles and how they were applied at the three stages of a career. The 54 teachers in both workshops completed a questionnaire on views of the policy and ePortfolio tool.

Teachers who took part in the Pedagogical forum in Stara Zagora gave positive feedback about the Portfolio as an evidence tool. Some of the teachers commented the portfolio in general, not just the electronic variant. However, most of the participants in the workshops consider ePortfolio a useful tool because of the flexibility for organisation of the information and access to it allowed by the electronic databases and contemporary technologies. Teachers also appreciate the potential of this tool for virtual communication and sharing experience with their colleagues. With the view of this, some additional functionalities of the platform should be considered to allow its use for professional networking, communication and exchange of information, in addition to its main purpose to store information and to generate ePortfolios.

Respondents estimate very positively also the possibility to validate through the ePortfolio not only the formal qualification, but also the informal and non-formal one, underlying at the same time the importance of demonstration of own good practices and examples for practical implementation of innovation as evidence for high qualification and advanced professional competences.

Comparing the results between the questions which have been asked, the greatest disparity in the feedback was shown regarding the principles for classification of the evidences (Q2). The most considerable comments were that:

- the principles should be well understood and accepted by the user of the ePortfolio tool, not used just formally;
- the principles (or the terms to define them) could be relative, depending from the context, personal circumstances or the stage of the professional development;
- some more principles can be added;
- the applicable principles may depend from the aims of the portfolio.

About one third of the respondents (32%) confirmed directly that they would use the ePortfolio tool, consider it contemporary and useful or think this is the future. 48% of the respondents approve the ePortfolio “entirely” and 44% - “to a large extent”, which makes the total of 92% of the respondents who gave unquestionably positive feedback.

Examples of comments to questions

1. Do you think the ePortfolio is a useful way to track teacher’s career?

- Gives better information about the knowledge and skills than the CV.
- This is a form of teacher's "business card" which is useful for the headmasters, parents, as well as for the teachers themselves to monitor their development.
- I don't think it is necessary to register and track (especially the latter).
- By completing a portfolio the teacher gets motivation for constant development and to present work to others.
- Because it follows the steps of the professional development.

- An ePortfolio is mobile, allows flexible arranging of information without bureaucracy; It is more ecological.
- Excellent instrument. From one side, it gives opportunity for building "shared identity", from another side - its public accessibility makes it a tool for new opportunities.
- Given considerable clarity and concreteness of the professional development.
- To a great extent gives good picture about work experience and opportunities for professional development.
- Depends a lot on the culture and experience of the teacher.
- Yes, apart from a document proof, the portfolio is useful with picture materials.
- Yes, definitely; However, it should be updated constantly because of its nature and content.
- Yes, because the information can be constantly updated; everything can easily be followed up.
- To a great extent the ePortfolio allows easy registering of all steps for professional development.
- Gives realistic information about the teacher's practice and the processes in his/her classroom.
- Yes. Gives comprehensive information in many different aspects about personal/professional development.
- Gives excellent opportunity for storing and systemising the documents.

2. Do you consider that the principles - *well qualified; continuing professional development; partnerships; mobility* - are useful for classifying evidence?

- These are useful, but one can better judge about the teacher's qualities in personal contact.
- It is important the facts in the professional portfolio to be well arranged. The use of principles is well justified.
- Allows better visibility of teachers' work.
- I think these are more harmful than useful defining the relation "principle–proof".
- Yes, I think these principles are the basic ones for sorting the information in the portfolio.
- I think one or another principle should be applied, depending from the aim of the portfolio.
- Portfolio as reflection of careers should accent personal qualities, which for "development"/ "mobility" will have to be interpreted.
- Yes, because they are important for professional qualification and competences.
- Yes - I consider them useful and realistic.
- I have reserves - some people may misuse them.
- Yes, but some more principles could be added.
- Depends on the aims of the portfolio.
- Seems quite general (indefinite).
- Participation in qualification courses is a prerequisite and a basis for professional development, but does not give a guarantee for high professionalism.
- Yes, but also mobility within one and the same country should be considered; also - online sharing of experience should not be underestimated, as it goes beyond boundaries.
- It is very important the user him/herself realises the importance of principles and avoids just their formal use.

- Often the terms are relative – they depend on context situations and the stage of professional development.

3. Do you feel that *formal, non-formal and informal evidence* provides a more complete view of an educator's knowledge and professional competence than just formal qualifications?

- Yes, but (again) after a meeting with the author of the portfolio.
- Teacher's profession requires not only a diploma, but also vocation.
- Yes, particularly the informal.
- I don't have an opinion.
- I consider it necessary to write down and present good personal practices and new methods for improvement.
- The formal qualification alone can't give a complete overview.
- Gives a more complete picture of the teacher's personality.
- The formal evidences outline a general profile of teachers, while non-formal and informal make him/her unique.
- To a great extent they determine the personal qualities of the teacher.
- Yes, totally agree.
- To be in better contact with the audience and to keep pace with today's time.
- Totally agree - we need to go beyond the frames imposed for years and years.
- Knowledge acquisition should not be limited to the formal types.
- Yes, of course.
- Informal evidence is hard to prove.
- Yes, but the focus should not be shifted away from teaching standards .
- The teacher should use all means for gaining knowledge and professional competences.

4. Would you use the ePortfolio for *annual review, registration, job interview or sharing practice with colleagues* as an efficient way to record experience?

- This is a good tool for sharing skills and ideas.
- The ePortfolio gives the most complete information about the teacher for each of the enumerated purposes.
- Yes, I would use the ePortfolio, in particular – for sharing experience with colleagues.
- I would rather not use an intermediary for contacts of individual character.
- Yes, I would use it.
- I think that different portfolio should be used for different purposes (in different contexts).
- Yes, as a manager I will be able easily to monitor the development.
- I think this is an excellent opportunity.
- Yes - this is the future.
- Yes, I would use it.
- We are overloaded with work and formalities.

- I think the prototype contains the entire information necessary to describe the acquired experience.
- Yes, this is a mobile and interesting variant for virtual communication and sharing of experience.
- I consider it objective and indisputable.
- Yes, I would use the portfolio in all these cases.
- Good pedagogical practice and professional qualifications depend not only on participation in different qualification formats, but also on implementation of innovations into practice which requires support.
- For sharing of experience and attestation - yes; I don't think it is good for job interview, as it could be misleading and taken out of the context.
- The e-version is a contemporary way for flexible use of the portfolio whenever needed and for fast update.
- This is not the only way. It is good to use also other options.

ENGLAND (TRAINERS): Using ePortfolio for tracking teachers' careers. Feedback from questionnaires given to 3 selected groups in the Midlands, UK

General overview

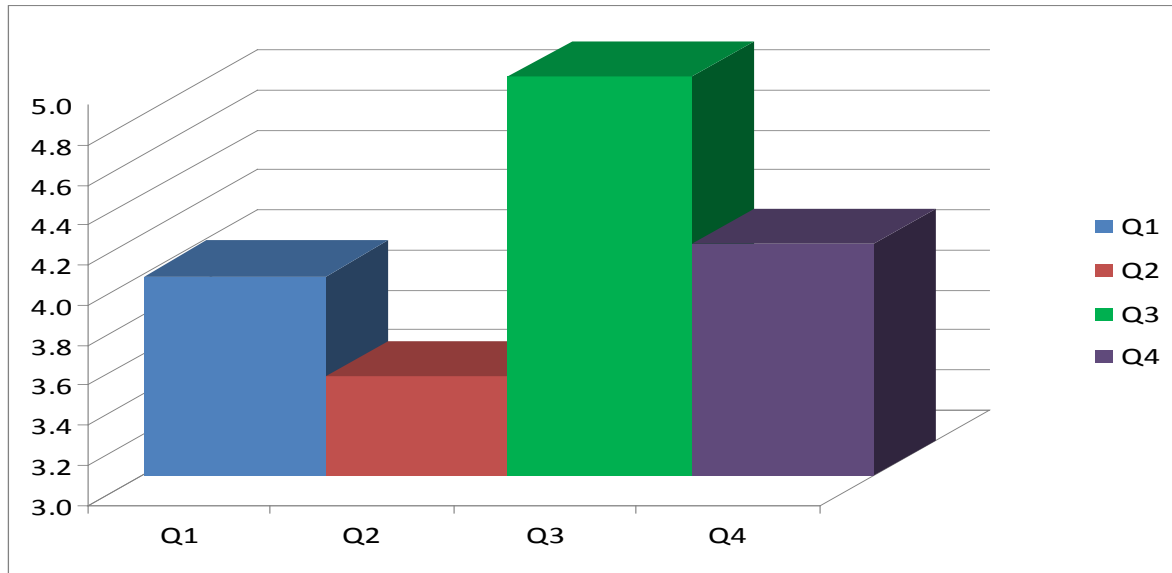
It was decided to select three groups to trial the ePortfolio and complete the questionnaires. This was based on the career stages of the groups as *teachers* and not *subject specialists*. For example, two groups from the further education college are professionally qualified and are now choosing to teach: a lawyer, accountant, electrician and youth worker, etc. The group from the Academy are all qualified educationalists. The partnership members had agreed to supply a minimum of 15 respondents each and twenty seven are the total represented in this report.

Summary

This report provides an analysis and evaluation of the use of ePortfolios for tracking a teacher's career with a small sample of respondents. Methods of analysis include face-to-face group and individual discussions, the exposure to the ePortfolio as a means of evaluating the tool and the completion of a ratings style questionnaire with supportive explanations. Results of data analysis show that responses from all three groups were affirmative with all ratings more positive than negative (3, 4 and above). Teachers offered considered responses and in all groups rated the formal, non-formal and informal evidence as giving a more complete picture for tracking a teacher's career. The report findings conclude that a mixed method of quantitative and qualitative data is beneficial to capture a deeper understanding of respondent views. Areas that require further investigation are the use of blue cloud, employer views, and discussions with educational providers.

Recommendations discussed include:

Group one: This is a discrete group of newly qualified further education teachers, who were part of a larger group who studied within the Initial Teacher Education department from 2010 – 2012 and returned especially for the training event and data collection activities.



The chart shows the average results of the rate given from the six respondents for each of the four questions in the questionnaire where 1 meant “not at all” and 5 meant “entirely [agree]”.

Examples from questions

1. Do you think the ePortfolio is a useful way to track a teacher’s career?

- Yes, as information could be accessed and stored at one point and updated when necessary: timing is an issue.
- Yes, as it is a form of giving evidence to display skills and achievements. It could be time consuming so perhaps it is a matter of pitching this positively to employees.
- Yes, because of the different skill scales between the EU countries.
- EPortfolio is useful as it allows you to upload/provide evidence for your career and development. However, it may also be restrictive as it only has five categories and maybe could have a ‘miscellaneous’ one.
- Yes, the principle is good, as it would be worthwhile getting some conveyance of Continual Professional Development (CPD) and how it is recorded across Europe.
- It is instant and accessible but anyone can manipulate e information to present themselves in a good light.

2. Do you consider that the principles - well qualified; continuing professional development; partnerships; mobility - are useful for classifying evidence?

- Simple, direct.
- Continual Professional Development (CPD) in one country means a different thing in another.
- These are useful categories but I am not sure if all and developments will be covered by these categories.
- I agree with the first three but is it necessary for one to do mobility? – What happens if a teacher does not fulfil those requirements? This aspect needs to be clarified.
- I think this may be a good starting point but hearing what employers have to say is perhaps more relevant. I would like to know how much time would be spent by employers evaluating this evidence for job applications.
- They are OK but classroom activity is the true measure of someone's ability.

3. Do you feel that formal, non-formal and informal evidence provides a more complete view of an educator's knowledge and professional competence than just formal qualifications?

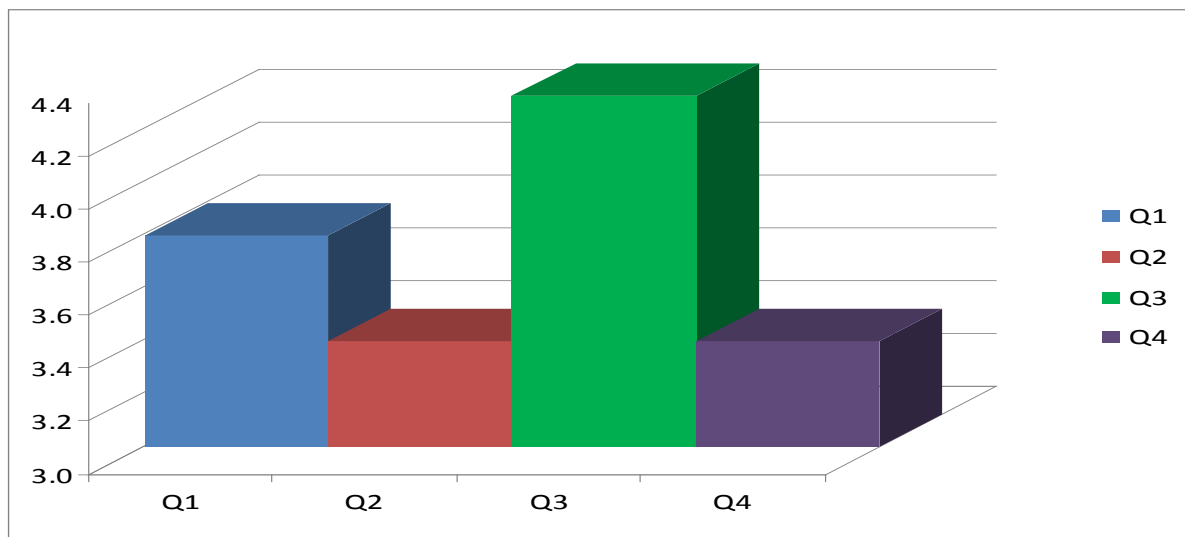
- Yes. Definitely. I work in adults career advice and have a strong understanding of how employers look for more than 'formal' qualifications as they need to have a way of deciphering who and who not to interview.
- Yes, it allows one to include all information/evidence related to work and gives one more leeway. However, with so much information, how does a prospective employer choose a future employee?
- I feel it is important to look at overall skills of a teacher when ascertaining ability and development.
- Yes as teachers you are always doing extras things to enhance your job.
- A person may have formal qualifications but this does not mean they are educators. Ability in class counts.
- Yes it provides a balance and perhaps takes into consideration skills that are acquired including non academic subjects or competency- based knowledge/skills.

4. Would you use the ePortfolio for annual review, registration, job interview or sharing practice with colleagues as an efficient way to record experience?

- I hate using computers!
- Yes. I think this is an efficient method of capturing information but I guess I may be concerned with the validity of what is input by others. I think guidance would be needed into understanding the ePortfolio.
- I would, but once I have more experience.
- Yes, I would use a repository of information. Commonly used media make sense. The universality is good.
- Yes, especially if it is universally recognised and accepted throughout the EU.
- I would. However, there are time constraints. Not enough time to fit it in as it is not a requirement but choice.
- In order for it to work, it needs to be part of the registration process.

- The IFL pebble pad for completing the 30 hours of CPD was a joke. This is better.
- We need time to be able to do it.
- Our targets are based on learner achievements.
- It would be amazing to capture those great teaching moments (as they sometimes get lost) and add to informal or even non formal evidence.
- There is a culture of sticking your head in the sand and yet jobs aren't secure anymore so this would be useful.
- Youngsters/Career experts need an ePortfolio.

Group two: This group are currently second year students of Initial Teacher Education 2012-2014. Again, they are studying pedagogy and andragogy instead of a subject specialism as they already have that.



The chart shows the average results of the rate given from the 15 respondents for each of the four questions in the questionnaire where 1 meant “not at all” and 5 meant “entirely [agree]”

Examples from questions

1. Do you think the ePortfolio is a useful way to track a teacher's career?

- A fantastic way to ‘capture’ and gather career related evidence.
- In principle the idea is a good one, e-based storage of CPD, Qualifications – transferable.
- Is such a paper trail necessary to track competency?
- Useful to track competencies. More self help on core standards, but depends if you want to teach across EU.
- Depends if employers regard it as useful.
- Yes, if it is relevant – i.e., looking to work in another country.
- Yes. All evidence would be great in one place.
- It is useful as you can track and update your progress.

2. Do you consider that the principles - well qualified; continuing professional development; partnerships; mobility - are useful for classifying evidence?

- Yes – encompasses fundamental principles of teaching/teacher development.
- In principle, it is a good idea – to practise?
- It's a paper trail.
- As long as it meet the core competencies.
- Categorisation is probably necessary, but categories imply linear progression which may not be relevant.

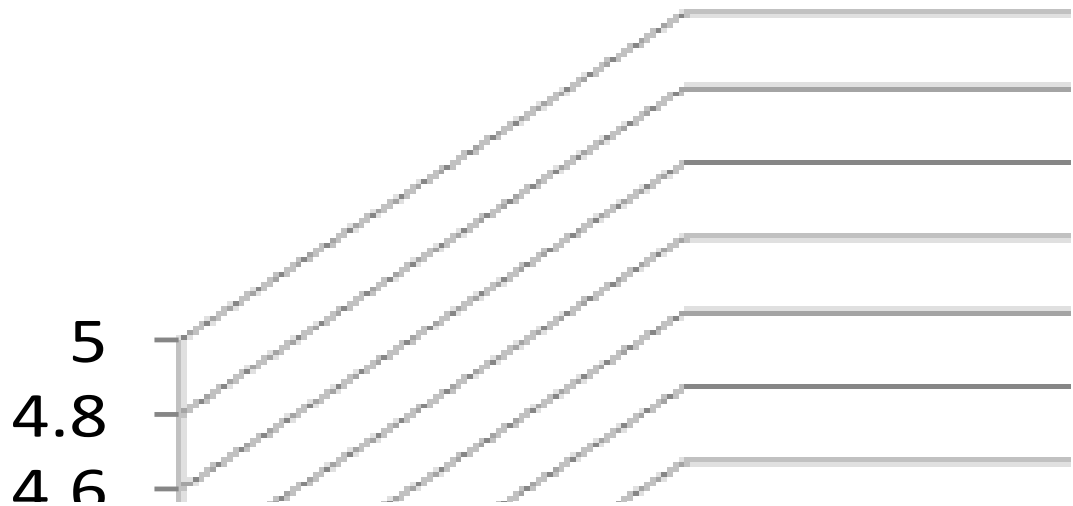
3. Do you feel that formal, non-formal and informal evidence provides a more complete view of an educator's knowledge and professional competence than just formal qualifications?

- An all-round picture of a person and shows a more holistic approach to ability, values and interests.
- Yes, it provides flexible to incorporate all types of evidence.
- Otherwise the viewpoint is from only a specific (education/box ticking) perspective.
- Must recognise broader experiences.
- Yes, qualifications alone do not show the breadth of valuable experiences.
- It gives the 'big picture'.

3. Would you use the ePortfolio for annual review, registration, job interview or sharing practice with colleagues as an efficient way to record experience?

- Yes, I am using it straight away!
- A good way to share information. Sharing it with EU colleagues is another story – but on the whole I like it.
- Would need to see this established.
- There may be more local systems in place, therefore duality of information.
- I would need to start using it to see how it evolves.
- A good place to collate ongoing CPD, showing development and progression.
- I might use it once I have qualified because I don't have much CPD experience.
- Already use blue cloud.
- All track CPD as part of employment.
- Need to join with other professionals, institutes, medics and engineers.

Group three: This group is made up of teaching staff at a special state school for pupils aged from 13 to 19 years.



The chart shows the average results of the rate given from the six respondents for each of the four questions in the questionnaire where 1 meant “not at all” and 5 meant “entirely [agree]”.

Examples from questions

1. Do you think the ePortfolio is a useful way to track a teacher’s career?

- Brilliant way to track evidence for career development. Needs to be backed by government/ employers.
- Helpful to keep records organised, safe and in one place but whether teachers would use it is uncertain.
- I feel it will be good to have an ePortfolio. Will only work if the government buy into it for CPD
- This would encourage a more professional view of teachers. It would also promote standard practice.
- It is useful to have somewhere to record career progression and update it. However, until it becomes a recognised tool used by employers, will teachers see it as providing real value?
- Some information needed on who has access to the sites i.e., employers, staff, parents.

2. Do you consider that the principles - well qualified; continuing professional development; partnerships; mobility - are useful for classifying evidence?

- The first three make sense but ‘mobility’ doesn’t carry equal weight.
- It works well for teaching staff but to be used by all school staff you may need different categories.
- Mobility would need clarification.

- Covers all bases. May need 'other' principles. Depends on experiences to populate each area.
- Yes, as it shows progression in your career (training and experiences).

3. Do you feel that formal, non-formal and informal evidence provides a more complete view of an educator's knowledge and professional competence than just formal qualifications?

- Formal qualifications do little to guarantee the teaching standards of an individual.
- It would be good to have examples of all three. More than formal qualifications will help build a better picture.
- This also allows teachers to explain and describe softer skills involved in teaching.
- Gives us a chance to upload other employable attributes.
- Yes, teaching involves more than the classroom role and this would provide a showcase of everything.
- Yes, as you need to show that you have more to offer than just qualifications.

4. Would you use the ePortfolio for annual review, registration, job interview or sharing practice with colleagues as an efficient way to record experience?

- If user friendly then maybe. Entering data initially would be time consuming. NQTs might buy into it readily.
- This would facilitate teachers recording developments centrally with data for the employers.
- Useful to help set goal. It would only work if all bodies across the profession take it on board
- Needs support for uploading documents.
- Could be a useful tool but needs to be a bit more user-friendly and recognised across the profession.
- Useful for job interviews, working with colleagues. People can check qualifications and work history.
- I would advise 'plainer' English. Is this transferable into other languages without losing context?
- Especially for teachers in the UK there is not ability to export data to either PDF. Excel or database file.
- Threshold applications would be easier in the UK.
- Would be good for NQTs.
- Needs to be linked to other websites and professional bodies.
- Interfaces can't go back to other pages.
- Numbers needed down the side. Would like to go to option 5 straight away.
- The general idea is a very good idea.

LATVIA

PEEP project master teachers' reflections on policy and ePortfolio piloting activities

Benefits	Possible threats
Good for raising self-esteem of teachers and other pedagogic staff	Difficulties with foreign language (most prevailing answer)
Most likely used by higher education faculty	Makes life more stressful- creates competitors
Are maintained for those, wishing to apply for a academic position	Video recording feature not available for all pedagogues
Candidates update their existing portfolios to prepare themselves for crucial first interviews	Lack of motivation for some highly professional teachers, as they have enough job in Latvian labour market, not enough time for international appearance
University level educators wish to document their achievements, such as dissertations, publications, awards, evaluations.	
Increase of motivation for innovations. Would be more efficiently applicable, if financially supported	
Should be updated for use in Latvia (language, specific themes)	
Video evidences are very useful	

General conclusions:

- Generally supported by LCC teachers
- Good for career tracking, particularly for young teachers and academic staff
- Organised collection of completed work- mostly supported by teachers with academic or professional experience
- Lack of motivation for professionals without academic career ambitions
- Portfolios place the responsibility on teachers to develop and plan professional goals
- Portfolios also correlate with national and state initiatives toward performance- based assessment
- As for master teachers and evaluators, portfolios give valuable information about new teacher and their abilities
- Shows personal educational philosophies and theories of education
- Gives opportunity to develop habits of reflecting on the success/failure of a lesson/methods/approaches

TRAINING SCHEDULE

On returning from the *master teacher course* in Bulgaria, a training schedule was drawn up for school staff. Teaching Assistants were included as well as Teaching Staff.

- **Session 1** – Explain background and purpose of the ePortfolio. Show an example of a portfolio and explain our role in the pilot
- **Session 2** – Explain the three different types of evidence to be collated and used as part of the portfolio. Start to list evidence – as a group – that could be included under each heading. Ask all to collate their evidence by the next session.
- **Session 3 and 4** – Introduce the “career stages” grid, use it to help define and categorise all the information collated – work together in small groups/pairs to complete this.
- **Session 5** – Work on individual PC’s in the IT suite to introduce the online program, how to navigate the site etc. Start to input data
- **Session 6** – Timetable non-contact time for two people at a time to work on their portfolio
- **Session 7** – Whole group session to identify any problems/difficulties with using the portfolio. Complete feedback forms.

INITIAL RESPONSE

Teachers and Teaching Assistants were enthusiastic to start the project and could see its benefit if it was widely used by all. Some who are less confident using online programmes were nervous about using it, inputting data etc, but felt reassured when told that they would be working together as a whole group, in small groups or pairs to complete the work. The career profile grid caused much discussion and confusion, especially for the Teaching Assistants. This needed more time than anticipated to go through and I’m unsure how valuable they found it as a group.

EVIDENCE GATHERING

This was a very worthwhile exercise for all staff. Once we clarified the three different types of evidence that we were looking for, the group list of what had been achieved, what could be included etc grew very quickly! As we worked as a big group, it helped staff to remind each other about training that had been done, courses attended etc.

INPUTTING DATA

Again, it was worthwhile to initially start as a whole group – to provide support for each other and to iron out any difficulties with using the site and its navigations tools. Further sessions for inputting data were timetables so that a minimum of two would always work together to ensure that the element of “support” was always present – as reassurance and to increase confidence in using the portfolio. Some difficulties were still experienced – files taking a v long time to load – and then not appearing when the portfolio was re-visited, photos not opening once uploaded etc.

STAFF FEEDBACK

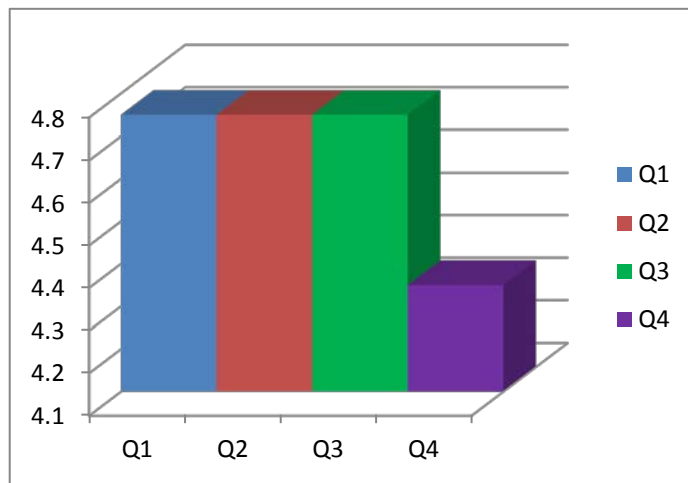
If the project is successful in becoming a Europe-wide CPD portfolio, then all staff could see the benefit of completing and regularly updating their portfolio – their concern was that if this was not widely used, then it may not be recognised by all, making its upkeep less important. Although there had been some issues with uploading files and pictures, they liked the format of the portfolio and that all the evidence, whether they were certificates, photos or reports were available electronically and in one place. Not all staff saw the benefit in using the “Career Stage Grid”, finding it repetitive and wordy. However they liked the three types of evidence and that it didn’t just have to be certificates.

CONCLUSION

In conclusion, as a staff, we liked the ePortfolio, applaud the fact that there are different types of evidence that can be used not just academic qualifications and liked the simplicity of the portfolio. If it were widely used by all then we can see the benefits of regularly updating the portfolio.

Summary of numerical data collected from partner countries

UK: Data from 58 teachers (30 senior, 28 primary teachers (31 females; 27 males) from a dissemination input and online questionnaire

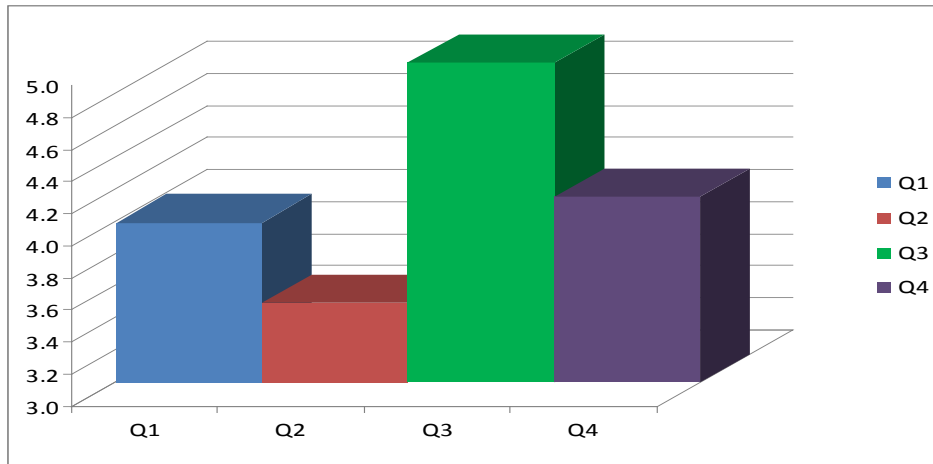


The project started 3 months later than anticipated, because of a delay in funding arrangements, with collection of data falling in the period of examinations and summer holidays. Therefore, it was proposed to send a questionnaire out to UK teachers, with the draft version of the policy document, by email with a contact person for queries and support.

The Master teacher programme in Sofia (April 2013) refined the questionnaire to be used on the pilots in each country. So, the questionnaires were sent to 120 teachers known to the English partners. The sample was chosen to reflect the three career stages, located on the tracking grid and an equal number of primary and secondary teachers were selected with a small number of those working in specialised pupil provision. Questionnaires were sent at the end of April for return at the end of term in July 2013.

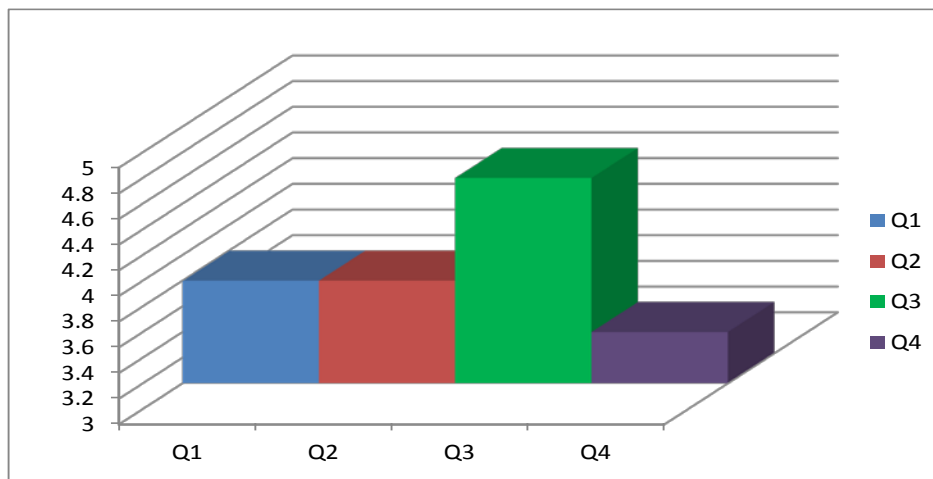
Queries were made by a number of the cohort about what comments should be made and in order to support teachers a model was sent out to everyone but each participant was asked to respond to the policy document with their own views as it was important to collect a range of opinions that could provide evidence about the utility of such a tool to track an educator’s career. The data reflects the fact that the cohort was ex-students from blended courses at Leicester University and therefore were experienced in tracking progress. High scores reflect knowledge of ePortfolios and positive views. They were less sure of the use of ePortfolios in various ways because of a lack of experience in their uses apart from gaining a qualification through this approach.

UK: Data from trainers working with adult students



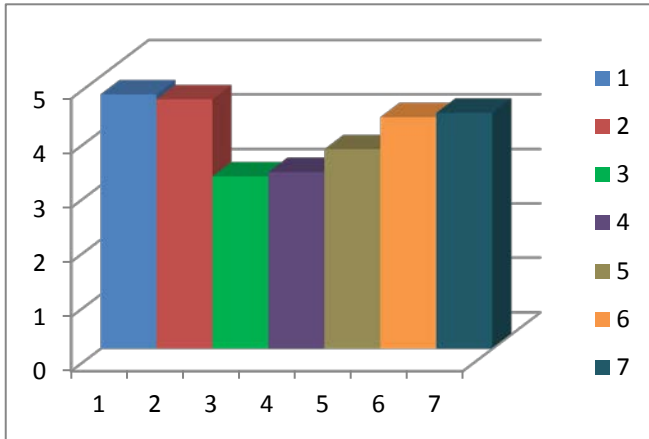
UK data from Trainers shows a strong, positive view that non-formal and informal evidence is important for evaluating teacher ability

England: Data from teachers working with senior students with special needs



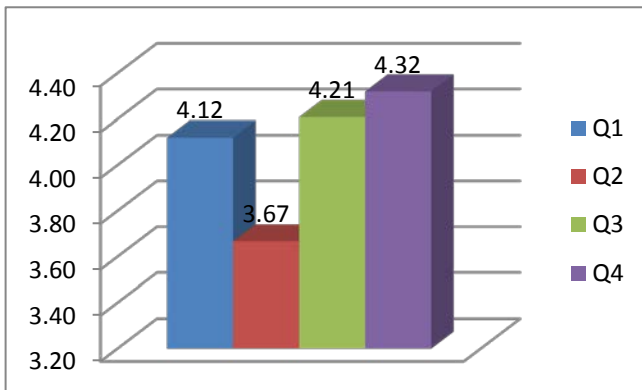
This endorses the inclusion of informal and non-formal evidence for judging a teacher’s ability

Wales: Data from teachers in a senior school



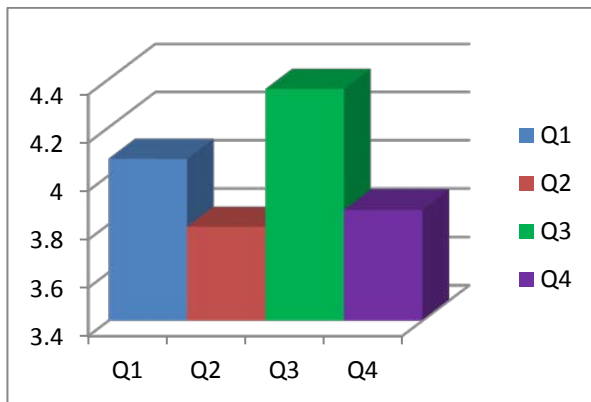
This data reflects the views of Master teachers who are very positive on all aspects of the eportfolio tool.

Bulgaria: Data from primary, secondary and higher education teachers



This group is very positive but because they have to work to standards are less sure about using principles as criteria for gainingT evidence although they expressed a view that these were more useful for transnational contexts.

Greece: Data from primary and senior school teachers



Here again is a very positive response for the use of non-formal and informal evidence but some reservations regarding the use of principles because standards are the recognised criteria for evaluating teacher competence.

These responses were reinforced in two meetings with educators with the second one including three teachers from other European countries.

Example of a questionnaire given to UK teachers after a dissemination exercise

QUESTIONNAIRE 2: REVIEW OF AN ePORTFOLIO TO TRACK AN EDUCATOR'S CAREER

Please **circle your rating** according to the following evaluation and **explain ratings**

1 - Not at all; 2 – Partly; 3 - Difficult to say; 4 - To a large extent; 5 - Entirely

1. Do you think the ePortfolio is a useful way to track a career?

Rating 1, 2, 3, 4, 5 – circle your rating with 5 as the highest. Explain...

5 – the present CV with formal qualifications is not useful as these vary so much according to where they were obtained. The ePortfolio is a good system to organise achievements for sharing and reflection so that we become aware of the gaps in our knowledge and skills.

2. Do you consider that the principles - *well qualified; continuing professional development; partnerships; mobility* - are useful for classifying evidence?

Rating 1, 2, 3, 4, 5 – circle your rating with 5 as the highest. Explain...

4 – this seems so much more sensible than standards. The new standards in England do not seem to mean very much. These principles are understandable across professions but will need policy backing.

3. Do you feel that *formal, non-formal and informal evidence* provides a more complete view of an educator's knowledge and professional competence than just formal qualifications?

Rating 1, 2, 3, 4, 5 – circle your rating with 5 as the highest. Explain...

5. This gives a 360 view of a professional and shows how their knowledge and skills are implemented. I have some experience of this tool and have used it with students on a maths course and this highlighted how they applied learning in everyday life.

4. Would you use the ePortfolio for *annual review, registration, job interview or sharing practice with colleagues* as an efficient way to record experience?

Rating 1, 2, 3, 4, 5 – circle your rating with 5 as the highest. Explain...

5. I think this approach will help to focus teachers on their development and career direction. Other professionals such as doctors now use this way to track careers and it seems to work for them.

PERSONAL DETAILS

Indicate your area of the country: Leicestershire State your initials: VM male

Indicate whether you are at the beginning (1), middle (2) or further specialist stage (3) 3

Where do you teach? - Community College 11-18 years

Any additional comments... Date of completion...July 2013.....

I think this is a very worthwhile project because the teaching profession must be more systematic about recording their achievements to assist reflection. We are now behind other UK professions in our CPD.

APPENDIX 9: EVALUATION OF THE PEEP POLICY BY EDUCATION EXPERTS

Evaluation of the PEEP Policy by Gill Clarke

Gill Clarke has been a successful Head Teacher in 2 London Primary Schools and a consultant to schools in special measures. She has been the Advisor on School Improvement for both Milton Keynes and Northamptonshire Councils assessing the Quality Mark for School Improvement and mentoring Head teachers and Governors in this large Midland area. Gill is Education Director of the One A Studio, responsible for school improvement and quality assurance issues. She is a magistrate in the Northamptonshire Courts.

General Comments

This document is very easy to read and the sections are structured to present a fluent argument. The policy provides a great professional manual for educators. This was also evidenced in the comments from teachers in the data collection, who had used the policy for in-house school training and found it an excellent resource for discussion.

The rationale for professional career tracking is sound and profound and all great teachers would share the views expressed about the need to produce a framework to assist personal development. Teachers I have consulted view the fact that principles provide a broad but meaningful set of criteria for collecting evidence from work and life experience. There should be no problem of integrating specific standards into this framework if so required.

It is essential that PEEP is given a life beyond the two years of the project which has sought to produce a policy and test this among the partner countries. In line with other professions, educators need to establish a firm structure for tracking their ongoing career and life experiences. This model allows teachers to present a career dossier in a global market. Informal and non-formal evidence certainly provides a clearer, more accurate picture of a particular person's expertise than a Curriculum Vitae that merely states qualifications achieved which we know vary in standard within and across countries. The ePortfolio enables a transparent and transferable record that gives a more complete picture of an educator's attitudes, knowledge, understanding and skills. The challenge now is to get this initiative accepted at policy levels so that teachers are required to produce this career record for job interviews, appraisal and in some places for registration purposes.

Gill Clarke, January 2014

Evaluation of the PEEP Policy by Professor Peter Chatterton

Peter Chatterton was visiting Professor at the University of Hertfordshire for 10 years and is an expert in technology as a tool for academics to change teaching and learning practice. Peter is Director of Daedalus e-World; Consultant, QAA (Scotland); Enhancement Theme Programme Consultant; Leadership Foundation for Higher Education; Changing the Learning Landscape Programme; Consultant and Critical Friend for Jisc and an Academic Associate, Higher Education Academy.

Evaluation by Dr Peter Chatterton

February 2014

I'll start this feedback about PEEP with a confession of bias – I believe that portfolios/ePortfolios are absolutely pivotal to supporting models of learning, teaching and assessment that reflect the needs and demands of a broad range of stakeholders (e.g. learners, tutors, mentors, assessors, employers, professional bodies) and build on the opportunities afforded by digital media and technologies. We've moved a long way from the "sage on the stage" style of teaching to approaches that place far more emphasis on autonomous self-directed learning, self-assessment and review, peer feedback and review and collaborative, social and informal learning – all within models of engagement that offer flexibility, personalisation and openness. Portfolios/ePortfolios support these approaches, providing benefits in terms of underpinning learning and assessment processes, reflective practice, transition, collaborative support, engagement with different stakeholders and personal, professional and academic planning, development and growth.

Having shared my enthusiasm for portfolios/ePortfolios, I have to express disappointment that their take-up by educational institutions – for both staff and students - has been rather sluggish. The reasons are many and varied and include: (a) misconceptions that ePortfolios are purely for storing evidence of meeting standards and/or simply replacing a paper-based portfolio; (b) lack of induction and training both in use of the technology and in the learning/assessment approaches that the ePortfolios underpin; (c) too much emphasis on standards; (d) lack of integration with teaching, learning and assessment processes and (e) lack of common approaches to portfolios across international borders and career progression.

All this brings me to PEEP – it was a joy to read the policy document as it addresses so many of the challenges and issues around introducing ePortfolios. In particular, the policy:

- Aligns ePortfolio adoption with learning and assessment processes.

- Underpins (life/career-long) learning models such as reflective practice, informal learning, peer/social learning and review, self-review.
- Focuses on principles for teacher competencies rather than standards.
- Promotes active engagement and collaboration using the ePortfolio.
- Encompasses both formal and informal evidence.
- Promotes personal, professional and academic planning and development throughout an educator's career throughout Europe.
- Supports use and re-use of recorded material for different contexts and stakeholders.
- Highlights issues such as privacy, data protection, ownership, IPR etc.

In addressing these issues, PEEP could well help to accelerate the adoption of ePortfolios in order to raise standards of teaching and learning and strengthen professionalism for EU educators.

One of the areas for possible development could be to focus on context-sensitive help and guidance within the ePortfolio system e.g. in relation to reflection and feedback. Having worked with a range of educational institutions on programmes to enhance feedback, there is evidence to show that feedback practices can vary considerably - and context-sensitive guidance could help address such inconsistencies.

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