# Efficient assessment of portfolios

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# Efficient Assessment of Portfolios

***Brief:*** to provide an account of ways in which portfolios are used efficiently in a selection of non-OU university programmes by:

- Describing portfolio practice in a minimum of five professional courses with large student cohorts
- Identifying efficient practices
- Discussing trade-off between educational effectiveness and efficiency
- Providing advice on the design of affordable portfolio assessment.

**Introduction: why is this report needed?**

There is a considerable and growing international literature on the use of portfolios for assessment. As portfolios are still seen in most circles as a new form of assessment, it is perhaps inevitable that most of the wordage is devoted to the benefits of this form of assessment in promoting student learning, developing autonomy, responsibility, the ability to reflect and any number of other benefits. Of course 'problems and issues' are raised, but the emphasis here is either on how to get students and staff to understand the nature of the task or on how to achieve an acceptable level of reliability in high-stakes assessment. Resourcing or costing this approach to assessment is often dealt with extremely summarily if at all.

The LTSN Generic Centre *Assessment* series, widely distributed throughout the UK HE sector, contains "A Briefing on the Assessment of Portfolios" by David Baume, a leading UK exponent of portfolio assessment. He devotes two paragraphs to the issue of tutor workload in his 24-page Briefing:

> *What of the time of the assessor? Assessing a large portfolio can also be a long job. It may take longer than would reading a single piece of work of the same length, because of the need to cross refer as between critical reflection and evidence. However, a portfolio can be a major, or even the sole, final assessment vehicle for a student's work on a course, meriting considerable assessment time. This said, what can be done to make the assessment task manageable for the assessor?*
>
> *The first step is to specify, and insist on, upper size limits (you could specify the maximum numbers of pages of evidence, and the*

> *maximum number of works in the critical reflection. In any event, assessing a final portfolio may not take as long as the size of the portfolio may initially suggest. Why? The assessor may well not need to read every word of a portfolio, particularly the evidence. If the critical reflection sections refer to specific pieces of evidence, or to specific paragraphs within the evidence, then the assessor may be able to form a confident judgement without reading all of the evidence. The assessor may simply need to check that the evidence is what the portfolio author claims it to be, and that it proves what the portfolio author claims it proves. And if the portfolio contains work seen and commented on earlier in the course, a detailed reading again may not be necessary.* (Baume 2001a, p.13)

And again in a four-page pamphlet published immediately following the Briefing:

> *At the moment of sitting down to mark a large portfolio, you may not feel that you have chosen a particularly economical method of assessment. But if the portfolio includes many pieces of work that would have been assessed separately, then it can be economical. If it allows you to make a single overall judgement on the development and attainment of a student, it can be economical. If you have asked the student to assess their own attainment of the course outcomes, and you use what they have written and what they have provided as evidence as a basis for checking theirview of what they have achieved, then it can be economical. As with any assessment method, we determine the costs and the time taken to assess when we plan the assessment method, though we don't always do this explicitly.* (Baume 2001b, p.3)

Klenowski's book published in 2002 is another popular resource for UK HE. She makes one reference to workload in a chapter on "Problems and pitfalls", in a section headed 'Resourcing':

> *Another major problem associated with portfolio implementation is the significant resources required [including]increased workload for teachers and excessive demands on their time…The assessment of portfolios adds significantly to teachers' workloads…the extent of work to be assessed and the administrative burden contribute to teacher workload…the increased workload for teachers needs to be acknowledged and supported if the benefits are to be sustained.* (Klenowski 2002, p.86)

The rest of this short section deals with the problem of students' workload.

Turning to the US literature, Hamp-Lyons and Condon note in passing "Out of consideration for students' and teachers' workloads, portfolios should collect no more writing than will fulfill the purposes for the assessment" (Hamp-Lyons and Condon

2000 p.168) and acknowledge in their chapter on a research agenda for portfolio assessment that issues of cost and efficiency “have been perhaps of less concern to educational measurement than they have needed to be: the temptation has been to spend as much money as funding agencies could be convinced to provide” (ibid. p.189).

In the medical education literature, attention has been focused unsurprisingly on the reliability of portfolios in high-stakes assessment. An interesting article on this topic by Pitts *et al* has however profound implications for workload: their study suggests strongly that “reliability is improved by using discussant pairs of assessors, with consequent issues of cost” (Pitts *et al* 2002 p.200).

It is difficult to know how widespread is the use of portfolio assessment in UK Higher Education. Anecdotally within the network of practitioners represented by CRA and educational developers represented by the Staff and Educational Development Association (SEDA), it appeared that certain areas had experimented more than others, portfolio assessment had become established in these areas and the introduction of personal development planning (PDP) was providing an additional dimension to the debate. Thus a study focusing on efficiency of the assessment process seemed timely. For this study it was decided that it would be beyond its scope to attempt to obtain a representative sample of portfolio use. Instead, a small number of respondents (at least six) would be sought from the most likely areas of practice to have considerable experience of dealing with sizeable cohorts of students.

## Methodology

Existing networks (CRA, SEDA and others) were used to identify respondents likely to have useful information. For the reasons mentioned above, no attempt was made to obtain a structured sample of respondents but there was an effort to include health care education and a range of other professional programmes. This process yielded about twenty names. Named individuals were contacted by email or by telephone if there was reason to think they had already been alerted to the request for information by an institutional contact. Nobody contacted was unwilling to participate but two individuals were unable to find a convenient time within the period of the study and the author failed to make contact with four more suggested names. Since the interviews were quite short (c.15 minutes) some respondents opted to give the interview immediately. In other cases, a date and time were arranged. Notes of the conversation were typed up, usually immediately after the interview, and in every case returned to the respondent for checking. Several respondents made minor alterations.

The author had taken the decision to define 'large cohorts' as cohorts in excess of fifty students and was specifically looking for examples of portfolios used for summative assessment. In the event, a small number of respondents was dealing with cohorts slightly under this number and/or not using the portfolio strictly as a tool for summative assessment. Rather than reject these interviews, the author has taken the view that nearly all yield some useful insights on the topic, so all have been included in the appendix to the report. The findings are based on a final total of 13 interviews.

## The Cases

An overview of the cases can be found in Table 1 overleaf. They are drawn from eight universities and one professional body.  Nine relate to undergraduate degrees, two relate to foundation degrees, one is a Professional Diploma programme, one relates to professional CPD requirements and one is a generic university requirement for newly-introduced Bachelors degrees. Most relate to programmes which are vocational or have a strong vocational element. The size of the assessment (in terms of credit value) varies from 10% of a 15-credit module to whole 30-credit modules.

**Table 1: The Cases**

| | Context | Size of cohort | Nature of assessment | Respondent |
|---|---|---|---|---|
| **A** | Two Yr 1 modules in B.Sc Computing Science | c.200 in Semester 1<br>c.110 in Semester 2 | 6 tasks, 30% of module assessment<br>Submitted and assessed online. | Brian Penfold<br>University of Wolverhampton |
| **B** | Online BA in Learning Technology | 150 in this year's cohort | Presentation of several pieces of work as evidence for learning outcomes with commentary.<br>Submitted and assessed online | Stephen Powell<br>Ultralab, Anglia Ruskin University |
| **C** | University-wide requirement | | A requirement that all students complete a portfolio – not otherwise assessed<br>Submitted and assessed online | Keith Russell<br>Universiteit Utrecht |
| **D** | Yr 2 20-credit module in Town & Regional Planning | c.35 | 3 components, the key one being a piece of reflective writing. 10% of module assessment.<br>Submitted and assessed online | Barbara Illsley,<br>University of Dundee |
| **E** | Level 1 module in 3 undergraduate programmes (2 Hons, 1 FD) in Business/Information Technology and Business/Information Systems | 120-145 | 50% of module mark, 2 reflective commentaries, 12 pieces of evidence for skills<br>Paper-based last year, on-line this year | Wendy Clarke,<br>University of Northumbria |
| **F** | Two Level 1 modules in B.A Creative and Professional Writing | c.75 semester 1,<br>c.65 Semester 2,<br>200-250 students in Semester 1 next year | 12 short pieces (200 -1000 words) plus 'polished' essay written for another module.<br>12 short pieces, 5 assessed (3 required, 2 chosen by student).<br>Submitted and assessed online. | Jackie Pieterick<br>University of Wolverhampton |
| **G** | Clinical Placement modules in B.Sc Radiotherapy – Yr 2 15 credits<br>Yr 3 30 credits | c.40 | Specified number of case studies (1000words), reflective log and periodic summaries cross-referenced to log<br>Total assessment for Yr 2, 50% for Yr 3. | Louise Waywell<br>University of Liverpool |

| | | | | |
|---|---|---|---|---|
| **H** | Final year (Level 2) module in Diploma in Nursing (Adult Branch) | c.90 | Total assessment for module. 5 sections, 3000 words altogether. Each section documentary evidence and reflective commentary (short essay) | Sue Ashton Liverpool John Moores University |
| **I** | Yr 3 assessment of B.Sc Occupational Therapy | 41 going up to 50 next year | A cv (5%); an annotated skills audit (5%); six structured reflective commentaries with evidence on key competencies chosen by tutor (15% each) | Judith Martin University of Liverpool |
| **J** | Level 1 15-credit module in B.SC Environmental Science | c.50 | 10% of module assessment. Two short reflections.<br>Submitted and assessed on-line | Eleanor Cohn University of Wolverhampton |
| **K** | Two units in Professional Development in Yrs 1 and 2 of Foundation Degree in Early Years – 4 more FDs next year. | c.30 in cohort | ‘Benchmark statement’ of c.500 words. Revisit, adding four statements. Structured synthesis c.2000 words. Prefers the term ‘narrative transcript’ to portfolio. | Frank Lyons, University of Portsmouth (Foundation Direct CETL) |
| **L** | Level 3 15-credit module on Video Pathway of BA Video & Digital Media | c.60 | Two pieces, each worth 50% of module assessment.<br>Report c2200 words; career plan<br>Submitted and assessed online | Tracy McCoy University of Wolverhampton |
| **M** | CPD requirement of Health Professionals Council (13 Health Professions) | 5% of up to 40,000 a year | ‘Profile’ drawn from their portfolio: three parts – context of their practice, commentary/claim to have met standards (2000-2500words), documentary evidence | Eileen Thornton University of Liverpool |

**Findings:**

The **factors** that affect workload are:

- Whether feedback is to be given;
- Whether a grade has to be assigned, which encompasses what degree of differentiation is expected and what is regarded as an acceptable level of reliability;
- How much work has to be read (or watched, if video is included);
- Whether time has to be spent *finding* the work to be read;
- The ratio of assessors to the number of candidates to be processed;
- Whether assessment time is factored into total teaching time.

The **strategies** which were found often address more than one of these factors and are often found in combination. For analytical purposes they are listed separately below, with reference to the cases which display them.

**1. Spreading the assessment over time [A,C,E,F,G,H,I].**

This is a common strategy found in some form in over half the cases. Respondents agree that it does not actually reduce the overall workload of assessment but is a 'less daunting" experience for staff [A] and "reduce[s] the psychological burden at the end of the course of so many unseen portfolios" [E].

When assessment is spread over time it usually involves feedback to the students – always the most time-consuming part of the assessment workload. So this strategy is often found in combination with others aimed at reducing the burden of giving feedback – particularly strategies 2 and 3 below.

**2. Self-assessment and peer-assessment [B,F]**

One often-cited rationale for peer assessment is that students receive more frequent, timely and detailed feedback from each other than they could possibly get from a tutor. Tutors who want to take advantage of this will usually get their students working in small groups producing frequent short pieces of work. Sharing and commenting on each other's work is presented as a key aspect of learning[1]. This approach often goes hand-in-hand with clear assessment criteria and an explicit effort to help students engage with them; and with a development towards students making their own selection of items for final summative assessment.

**3. Giving no feedback on final assessment [F,L]**

Some staff explicitly offer feedback on work submitted by periodic deadlines during a course but not at final assessment. This strategy penalises students who are not organised enough to submit work for feedback or choose not to, thus reinforcing the philosophy of student responsibility.

**4. Focusing feedback on specific items at final assessment [E,F]**

A variation on strategy 3 is to spend more time and give feedback on certain items in the portfolio, usually reflective pieces, and spend correspondingly less time on other items, typically documentary evidence, skills audits etc. This may amount to simply noting their presence or absence. A checklist can be used for this purpose, ticking off required items. It is quite likely that this strategy of focusing on certain items for feedback will be combined with strategy 5, with the same items being those that are graded.

**5. Most or all of the portfolio items are not graded/only graded Pass/Fail [D,J,M]**

Where the portfolio work is a minor part of the module assessment, a simple Pass/Fail grade is sometimes seen as appropriate. More often there is a mix of items, as in Strategy 4, where the items seen as more important are read carefully and graded, while other items are simply noted as being present.

Grading is unlikely to be relevant to CPD assessment, where the only question is whether the specified standards have been met.

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[1] This is exemplified in the Patchwork Text approach developed at Anglia Polytechnic University in partnership with Nottingham Trent, Cambridge and the Open University (Winter 2003: see also other articles in a special edition of *Innovations in Education and Teaching International* in 2003) and in a developing tradition in the teaching of writing in American universities (Yancey 1998). Case B draws directly on the Patchwork Text studies and the respondent in Case F was aware of both the Patchwork Text studies and Yancey's work.

**6. Specified organisation with documentation [E,F,G,H,I]**

It is easier and quicker to assess a portfolio if the assessor knows exactly what is in it and where to find items. Where this strategy is used most effectively, the student must complete documentation (usually provided) which states what the contents should be and in what order. Requiring the student to complete the documentation either by signature/initials against each item (where specific items are required) or by indicating location of evidence against each outcome/standard helps to ensure that the student has checked the portfolio for completeness. The assessor knows what to look for and where to look for it. Depending on the type of portfolio and the nature of the items, it can sometimes be sufficient to cross-check the student's claim for the presence of an item, a tick-box exercise. Used in conjunction with Strategy 4, the assessor can home in quickly on the items which need more careful reading, possibly grading and possibly feedback. Surprisingly, not all of those who provided checklists or other documentation for organisation required students to use it.

This level of organisation usually goes hand in hand with clear criteria aimed as much at helping the candidate to check for completeness and adequacy as at helping the assessors.

**7. Candidate presents/assessor selects a sample of evidence [E,F,G,I,M]**

Selection of items for assessment is another common strategy to reduce the sheer amount of reading. Sometimes the assessor selects what she wants to see [I], sometimes the student chooses what he regards as his best work or best evidence [E, F,G,M]. The advantage of the assessor making the choice, particularly if this is made late on in the process, is that it can be assumed that the student has completed all the other possible items that could have been selected. The advantage of the student making the choice is the greater involvement of the student in the assessment process, and more confidence that he can make accurate judgements about his own performance or about what constitutes good evidence. However, allowing the student to make the choice is likely to be more time-consuming because the assessor again does not know exactly what to expect.

A specific example of reducing the workload associated with reading learning logs or journals can be found in Case G. Learning logs are problematic in a number of ways:

many students dislike keeping them and claim not to know what to write, staff cannot keep pace with the volume and often feel they should be private to the student anyway. How to ensure they are kept without actually reading them? Students on clinical placement are asked to write a periodic summary of their strengths and weaknesses, and the opportunities and barriers presented by their placement, cross-referenced to entries in their learning logs. Tutors hold review meetings covering the same period, to which students are expected to bring their learning logs. Tutor and student go through the student's summary and the tutor can ask for exemplification of what the student has written, which will necessitate the student referring to the relevant log entries. The tutor does not need to read the entry herself, thus maintaining confidentiality, but the records need to exist to enable discussion.

**8. A robust and tested moderation strategy [M]**

Several respondents mentioned the burdens of moderation in passing [A,E,G,H]. Only the CPD example [M] has thought explicitly about the minimum requirements for robust moderation. Since the issue of moderation is frequently poorly understood and inadequately addressed in relation to more traditional assessments in higher education, it is not surprising that good practice in the efficient moderation of portfolios is hard to find. This is clearly an area for more work, perhaps building on the studies by Pitts *et al* (2002).

**9. Online assessment  [A,B,D]**

Several respondents were using electronic systems to receive and respond to students' work and for students to collect and present their work. None regarded this as more time-consuming, although one respondent commented that it took some getting used to [D]. Three of the examples are from programmes with a technology focus, so both staff and students are accustomed to working on-line. On-line working brings with it other benefits provided the appropriate technology is used. Items of work can be rapidly shared with both tutor and peers, comments added and the work returned. There is a suggestion that students take more care in the presentation of on-line work [A] though this needs further observation. Certainly guidance and models can be easily provided and updated [M].

**10. Adequate staff-student ratios [A,B,C,G,H,K,L]**

This may seem too self-evident to be called a strategy, but several respondents mentioned its importance. Either they were a member of a course team each of whom took responsibility for a group of students and their assessment [A,C,G,H,K] or they were in the process of asking for more assistance [L].

**11. Sampling from the cohort (M)**

This is a strategy for handling very large numbers of portfolios for professional re-registration.  In the case presented, every year a sample is chosen from that year's re-registrants, who then have one month to produce a 'profile' which is essentially a selection of evidence from the portfolio they are supposed to be keeping of the continuing professional development. If not chosen, they must tick a box on their re-registration form to confirm that they are indeed keeping their portfolio up-to-date. Sampling is just one aspect of the overall strategy which the professional body in this case, the Health Professions Council, has carefully thought out for making the workload manageable. Several of the strategies listed above are also included:

- the selection of a limited number of items from the total portfolio (chosen in this case by the candidate);
- a focus of assessment effort on one item i.e. the reflective commentary;
- clear organisation including clear criteria to be met.

**12. Assessment for learning [B, F, G]**

This is not so much a separate strategy as a belief expressed by some respondents to justify the amount of time they spend on assessment.  It would become a strategy if there is a clear identification of time spent giving feedback on portfolio items as *teaching time*. The clearest curriculum model which embodies this belief is derived from Winter's work on the Patchwork Text (Winter 2003). Here the tutor explicitly sets up learning groups who share and comment on each other's work. The work consists of short pieces produced weekly. The production of portfolio items, discussion and revision of them after feedback from tutor and peers constitutes the main vehicle for the students' learning. Final assessment requires each student to write a narrative/commentary which 'stitches' together the 'patches' of work, and is a personal account of what the student has learned and/or how the learning outcomes of the module have been achieved.  Tutors with this kind of model in mind [B, F] are apt to argue that the 'assessment workload' should in fact be seen as part of the 'teaching workload' so the time spent on it, although it may seem excessive to outsiders, is justified.

**Discussion:**

The first step in designing a portfolio for efficient assessment is to decide exactly what is being assessed – in other words, what type of portfolio is intended. 'Portfolio' is a broad term covering a range of different usage. At one end of the spectrum it refers to a ***collection*** of the learner's work. This notion of a collection is a minimum definition: it is difficult to imagine any use of the term which refers to a single, sustained product. Already however there are implications for assessment workload: to read (watch, look at) and evaluate two separate pieces of work will take longer than the same process applied to one piece even if they are of equivalent length. If the assessor has to arrive at a global assessment, again this will take more time.

At the other end of the spectrum of usage is the portfolio as a collection of evidence to demonstrate pre-defined skills, attributes or learning outcomes[2]. This corresponds to Baume's definition of a portfolio as a structured collection of evidence and critical analysis designed to support and document learning and development towards the intended learning outcomes of the course, to be used as a vehicle for assessing attainment during the course. An extreme example of this type of portfolio is the NVQ portfolio which is very highly specified in terms of the type and quantity of evidence, with little or no requirement for the candidate to comment on the items included. In higher education one would expect such standards-based portfolios also to contain 'claims' – a commentary by the candidate as to why the particular items of evidence have been selected and why they demonstrate the outcome claimed – and/or 'reflections'. A reflection may be a commentary by the candidate on an item or items

[2] Such portfolios are very commonly used to assess programmes for new university teachers. There is no doubt from the author's own experience that each portfolio of this type constitutes a major assessment task, particularly when used both formatively and summatively. However, no example from this constituency was included in this study because the author was unaware of any programme with sufficiently large numbers to constitute a major assessment problem.

of evidence or it may constitute an item of evidence in its own right – of the ability to think critically and analytically, to demonstrate espousal of professional values, to connect theory and practice – in fact potentially addressing a whole range of different criteria[3].

Assuming that the type of portfolio will determine precisely what is being assessed, the choices are broadly as follows:

- individual items *per se*, where the judgement is about their quality;
- an item or group of items as evidence or claim for an outcome or standard, where the judgement may be about the strength of the evidence, its range or completeness and whether there is verification of authenticity;
- reflective items, where the judgement depends on what the tutor understands by reflection and its purpose in a particular task;
- the completeness/organisation/presentational aspects of the portfolio.

It was claimed on page 8 that the factors which affect portfolio assessment workload are: feedback; grading, differentiation and reliability; volume of work; the quality of the sign-posting and organisation; staff:student ratios; and the prevailing culture's attitude towards assessment as learning. Staff:student ratios and the way teaching hours are reckoned are part of the institutional context for all assessment. However the first four factors are generally under the control of the tutor or course team, at least to some extent. Looking in turn at the two types of portfolio described above, how can each of these four factors best be addressed? Does 'efficient practice' differ between the two ends of the portfolio spectrum?

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[3] The CRA ran a series of workshops on *Supporting Learning from Reflection* in 2001-2. From these workshops it became clear that reflective tasks were quite frequently designed for students because of the tutors' belief in their value, without a clear decision having been made as to how these tasks were going to be assessed. Often this only became clear when the work had been submitted. The workshops were designed to help tutors clarify and articulate their implicit assumptions about the purpose and value of the reflective tasks. Possible criteria for assessing reflective tasks were offered to participants. These were: accuracy of observation; analysis of events/situations; identification of relevant elements; awareness of own feelings/emotions; awareness of own attributes/qualities; awareness of own weaknesses; awareness of own learning; ability to make connections with ideas; ability to make connections with prior knowledge; honesty/authenticity; recognition of/planning for next stage; commitment to action/change. Most participants were satisfied with this list and could identify the three criteria most relevant to the task they had set their students.

**1.** *Portfolio as a collection of the candidate's pieces of work, each of which can be judged on its own merits: examples are cases F,J,K and L.*

i. Feedback can be given as each item is produced and can be contingent on production by deadlines throughout the course. Final assessment can dispense with feedback. Peer feedback can supplement tutor feedback to reduce load on tutor.
ii. Grading will take longer if separate grades for different items need to be conflated. A specific item could be selected for grading, with other items simply required to be present.[4]
iii. To cut down the amount to read, the candidate can select items to be assessed (thus showing ability to judge own performance) or the tutor can select items to be assessed (thus ensuring a common format and a likely increase in speed over time).

**2.** *Portfolio as a collection of evidence against a set of outcomes/standards: examples are cases E,I and M.*

i. Feedback could be given during a course if each 'claim' is submitted when the candidate thinks the evidence is sufficient. The feedback might simply be in terms of whether the standard has been met, or what more is required.
ii. Grading of this type of portfolio is most efficiently done against outcomes/standards rather than individual items[5].
iii. Since a judgement has to be made about the strength and sufficiency of the evidence, it is likely that everything submitted has to be read. The tutor can require particular kinds of evidence to make the checking process faster. Size of the evidence (number of items, word/page length) can be tightly specified.
iv. Clear organisation, presentation and cross-referencing of the evidence by the student is crucial to efficient assessment, so it can be a requirement before the portfolio is accepted for assessment, or it can be an aspect of the grade.

It appears that there are some differences and some similarities in how to design efficient assessment depending on the type of portfolio required.

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[4] In this type of portfolio, the criteria for grading may well be the same as for more traditional forms of assessment (see comments in Case H). If the selected item is a reflective piece, previous comments about the need for clarity of definition and purpose apply.

[5] It can be problematic to align this with university grading regulations, especially if every outcome must be achieved before the whole portfolio is passed. If not all outcomes have to be met, some differentiation of grades can be achieved by simply summing achieved outcomes. Otherwise, the minimal amount of differentiation for each outcome consonant with an acceptable level of inter-assessor reliability should be adopted. A suggestion would be: evidence just meets expectations; evidence clearly meets expectations; evidence exceeds expectations. It was not possible in this study to identify best practice in this area since respondents had not considered the issue in any depth.

Two themes which emerged from this study do not fit easily into one or other of the 'portfolio types' given above. One concerns the use of criteria, the other is about 'getting faster'.

Clear criteria are widely regarded as a key aspect of good assessment practice. In terms of assessment workload, the presence or absence of clear criteria interacts with other important variables of grading and giving feedback. This study allows some comments to be made about how clear criteria could improve efficiency in some circumstances, but there is insufficient evidence for a clear judgement on whether feedback according to clear criteria is more or less time-consuming than feedback from impression marking. This could be an interesting area for further study.

Several respondents reported that they got faster as they proceeded through the pile of assessments [A,H,L]. Getting faster seems to be a combination of some or all of the following factors:

- assessor choice of evidence (knowing what to expect)(strategy 7);
- clear documentation (knowing where to find it)(strategy 6);
- giving no or minimal feedback (such as ticks) at final assessment (strategy 3);
- not having to make grading judgements (strategy 5).

There was a suggestion that the assessor could not increase her speed of marking if the format and content of the portfolios was very individualistic [L].

**In conclusion:**

As Baume points out, 'planning any assessment method means balancing the quality of the assessment judgement that can be made with the time and effort applied to the assessment' (Baume 2001b). Although this study was concerned narrowly with efficient assessment and therefore ignored the growing literature which promotes portfolios as assessment tools, it was clear from the interviews that respondents were enthusiastic about portfolio assessment, often at the expense of their own extra time and effort in assessing. However it also became clear that well-established practice is still difficult to find and practitioners are engaging in trial and error in designing their systems. If portfolios are to continue to spread as an assessment method and fulfill their educational potential, more attention must be paid to the question of efficiency. This study has developed some hypotheses and pointed to some areas which would repay more systematic investigation.

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# Appendix:

# Notes from the interviews

**A: Brian Penfold, University of Wolverhampton**

Students are on Yr 1 of a Computing Science degree programme, c.200 in a Semester 1 module and c.110 in a Semester 2 module. Brian is module leader for both. Modules involve lectures to whole group and workshops in groups of about 20. Five staff including Brian support the module so typically each has two workshop groups. Pebblepad (Wolverhampton's e-portfolio tool) has been used this year for the submission and feedback on fortnightly tasks, each student and workshop group supervisor]being given their own gateway, thus five or six tasks. For the first module, the six tasks taken together comprise 30% of the module assessment, the other 70% being split 30% mid semester 40% second CAA at the end of the module.

Some tasks are about generic academic skills eg Harvard referencing, others are more technical (especially in the second module). Each task involves approximately one page of writing or equivalent. The marking is not particularly onerous, not quite right or wrong but each task is marked out of 8 with different but quite simple and straightforwardly applied criteria for each. For example the referencing task requires two references (2 marks) correctly set out (2 marks) with the topics summarised (4 marks).

Brian has tried and compared two systems for assessing. In the first semester each tutor assessed his/her own workshop groups for each task, thus c.40 assessments each fortnight and he moderated. The moderation was a bit onerous. In the second semester, each tutor assessed the whole group for one task, thus 113 assessments but only once. The second method was intended to make moderation easier but psychologically facing that number of pieces of assessment is daunting and took the best part of a day. It feels much better spread out over the semester so he will go back to this. He finds assessing 20 tasks takes a couple of hours, maybe three hours for two groups (40 students) as one does get quicker.

He has noticed that writing comments onscreen in a tidy space provided seems to have the effect of improving the quality of the comments! He also finds that students writing their assessment pieces in a webfolio in Pp are less likely to plagiarise than when they were creating Word documents (this used to be a big problem) and also seem to take more pains to present the work well, add links in etc. It's actually much more difficult to plagiarise from a webfolio, the effort involved seems to discourage it but this could be transient because it is their first exposure.

**B: Stephen Powell, UltraLab, Anglia Ruskin University**

The programme is a BA in Learning Technology research, started three years ago. It runs entirely online and the assessment is entirely by an 'e-portfolio' uploaded into file.

There are currently 350 students altogether, 150 in this year's cohort. The youngest is 18 but the bulk are 30s-40s. They are all working FT, many in education or the health services and want to do a degree without stopping work – you could say they were part of the lifelong learning agenda rather than widening participation. They have to have a job which allows for action research opportunities, and obviously they have to use technology to participate. The degree focuses on areas of learning and organisational change, depending on their work contact. Before they start they have a telephone interview to check these requirements.

The programme makes use of a range of free technologies designed to promote collaborative learning. First Class conferencing system and Plone CS (designed for people working on collaborative websites) are used, also blogs. Students are encouraged to set up different folders for different modules.

The method of learning and assessment is inspired by Anglia Ruskin's Patchwork Text work. A typical module will have suggested learning activities against each learning outcome but there is plenty of room for students to define these – a report, a website, a video. (Some of the assessment criteria refer to use of a range of media.) The assessment is a patchwork presentation of these with a commentary running alongside (text or audio) which should be very explicit about what they have done. What they are looking for is several pieces building towards a summative 'stitching together'.

It is time-expensive to assess. They do have a fair amount of self-assessment. Peer-assessment is more problematic but they put time and effort into the community aspect of the course and formative assessment. It's built into the assessment criteria to share work with each other and to **reflect** on the feedback they receive.

When the programme started, each learning facilitator had a number of students to whom s/he gave feedback and whose work s/he marked. (The ratio is one facilitator to 35 students.) Now the work is taken in anonymously and blind marked. There are 6 modules a year and 6 hand-in points (4 next year) but students hand in work on three occasions. For any particular module, to read it through and write a thorough coversheet of feedback would take approximately 45 minutes (unless there's video – that makes it hard to keep to this!) So the total is 45 x 6 x 35 portfolios a year (counting each module's work as a separate portfolio). However compiling the pieces for the portfolio is a key aspect of learning on the programme so the time is justified.

**C: Keith Russell, Universiteit Utrecht**

The University of Utrecht is a research-led university. It took the initiative 4 years ago to require all its Bachelors students to create a digital portfolio. The university does not use specific e-portfolio software, instead each student has an amount of open web-space and has access to a few templates in html or Word. The portfolio was not envisaged as an assessment tool as such: it was an aspect of the university's desire to make sure that students developed broad academic competences following a move towards broader Bachelors degrees (on the Anglo-Saxon model!). The following account is based on the experience of the Faculty of Social Sciences.

The university suggested a central list of competences. This was quite a practical list so most areas have adopted these but added others specific to their programmes. So competences are defined by programme (in a manner similar to Subject Benchmarks) so will vary between Faculties/departments. Officially the students should pass all the academic competences defined by their programme by taking a range of courses (modules) but in practice this is so complicated to monitor that compulsory courses have been put into the programmes. One page/template in the portfolio prompts students to provide evidence of competences by listing which courses they have taken, which competences are developed in these and reflecting on this.

The use of the portfolio is loosely associated with the university's tutorial system. In principle they are separate but the tutor is the person evaluating the portfolio as the student progresses. Each member of academic staff will have 20-40 students as their tutees. Students get an individual or group talk in Year 1 on how to create a portfolio how to put it on to the webserver and make sure that the tutor can see it. Tutors are expected to discuss how they are doing with their portfolio in individual meetings: 4 individual or group meetings in Year 1 and 1 or 2 in Years 2 and 3. Students are prompted to go into the portfolio through the connection with the tutorial meetings, as they should be asked about their progress. The portfolio has different functions: to showcase work, as a planning tool (to help the student choose courses and minors). Another page/template in the portfolio records actions and targets agreed in the tutorial.

It can also act as an effective monitor of academic compliance: not all tutors carry out the tutorial role as intended. The university doesn't have strong guidelines on the workload implication of the tutorial system. An individual meeting would normally take a half to one hour. In practice, some tutors take this role seriously, a large number don't. In Psychology for example, a large programme recruiting c.500 students a year, the tutorial system is very low-key and the students simply don't turn up to their meetings. In this environment it's common for students to do very little work on their portfolio till the last month of their programme, then try to build up the whole thing in a month. The central training unit (IVLOS) offers training on how to coach portfolios (be a good tutor/mentor) but this is not compulsory for staff. It's difficult to estimate participation rates by students in the tutorial system – perhaps 50%? – and harder still to say what rate should be aimed at. Ultimately the programme leaders need to put more emphasis on its importance for students.

**D: Barbara Illsley, University of Dundee**

Portfolios have been used as a small part of the assessment (10%) of a 20-credit year 2 module for the last three years, with a cohort of c.35 students on a Town and Regional Planning degree. The module is a management module where students work in teams as environmental consultants. The rest of the assessment includes a tender document and a greenbuild design, with each student working on a different aspect of the design.

The assessment has three components: their ability to put a portfolio together; a skills audit with evidence to back up their claims to skills; and a piece of reflective writing on what they have gained from the module. It is assessed on a Pass/Fail basis, on whether they have engaged with the exercise. It is the first time students have used a portfolio in this way so the expectations are fairly basic.

In the first year, RAPID was used (hosted at Loughborough) but in the second and third years they have used Bb CS/e-portfolios with templates drawn from RAPID with their permission. In the first year some students failed to submit but since then they have had 100% submission.

She estimates that each portfolio takes 10-15 minutes to assess, including written feedback. She has found the experience of assessing online no more difficult than assessing on paper once she got into it.

There is a feeling in the department that this module as a whole takes a huge amount of time and effort, but student evaluations are very positive. The whole module emphasises skills development and students refer back to it in later years as important. Another colleague is considering using a portfolio in a similar way for the entire assessment of a module focussing on skills and ethics.

**E: Wendy Clark, University of Northumbria**

Level 1 module running over two semesters across three undergraduate programmes (2 Hons and 1 FD) in Business/Information technology and Business/Information Systems (therefore students are fairly computer-literate). Cohort starts around 145, drops to around 120. The module is Study Skills (team-working, time management, report writing, communication skills etc) integrating PDP.

Last year the portfolio was paper-based, this year they've used Bb CS and e-portfolios, converting paper-based documents into online. Students can work in their own webspace then upload into CS and then into e-portfolio.

The portfolio constitutes 50% of the module mark, 50% is by exam. The exam tests theory, the portfolio tests skills and ability to reflect. The portfolio contents are: 2 reflective commentaries of about 1500 words each, the first a reflective personal statement – where I started from, where I've got to – and the second a commentary on the whole PDP process; twelve pieces of evidence for six transferable skills (two for each) in Semester One, more to be added for Semester Two,. The students can choose what evidence to include but they are given a lot of guidance about what to put in. This includes the tasks they carry out on the module and elsewhere, they're 'pointed in the right direction'. So far they haven't been required to give a rationale or claim for how the evidence demonstrates each skill but she would quite like them to do that.

Portfolios are handed in to check progress at the end of semester 1, when they should contain the first reflective piece. At that point other contents apart from the reflective piece are not necessarily marked. Handed in for both summative assessment and feedback at end of semester 2. There are three in teaching team, so c.40 portfolios each: 30-45 minutes each at the start of marking but this gets shorter (but this includes writing feedback comments). At the moment all the marking is done at the end and it would probably be better to have marked some earlier – some pieces have been seen, but not formally assessed. They tend to look at the more important things – the reflective pieces obviously and some of the tasks the team has given them. Other bits of evidence eg spreadsheets for numeracy it's more a case of noting that they're there. It's impression marking rather than detailed but they do have to grade on a % scale (university requirement) so they do swap a proportion after first marking, especially when there is doubt about what grade to give.

Documentation includes a list of the transferable skills they need to evidence down the right-hand side with spaces on the left to note where the evidence is. If this is an electronic document (they now put templates on the U drive which students can upload), hyperlinking is possible. Also a template for thinking about their strengths and weaknesses.

They moved to the e-portfolio mainly because of the bulkiness of paper portfolios. The team are used to assessing online in the rest of their work. She believes the e-portfolio motivates the students, partly because they believe that the team can check up on their progress. The team can't write comments on materials on their e-portfolios, that has to be done on a paper marksheet as they read a portfolio. There is a facility for comments to be added to the portfolio online, which they intend to investigate for next year. However, the paper marksheet is easier when marks have to be entered on the student record system.

It is taking a lot of time. However it is a research interest of both herself and another team member, Jackie Adamson. This is the first year of the e-portfolio and they have learned lessons. They will allocate students to specific tutors next year. They want to keep a tighter grip on progress, monitoring throughout the year. She accepts however that even if this monitoring is for assessment, it will not reduce the overall time spent assessing, merely reduce the psychological burden at the end of the course of so many unseen portfolios.

**F: Jackie Pieterick University of Wolverhampton**

Creative and Professional Writing Programme – around 70 students at Level 1.
Also "Writing for Academic Success" – Level 1 skills module (=US Comp 101)
c.75 Semester 1, c,65 Semester 2, next year 200-250 students in Semester 1.

All have been assessed using paper-based portfolios. Pebblepad (Wolverhampton's e-portfolio tool) has been piloted in a Level 3 module Teaching and Tutoring Writing with 8 students, next year it will be trialled on the Level 1 Craft of Writing module with c.60 students.

For "Writing for Academic Success", students write short pieces (200-1000 words) every week and can submit whatever they've done. Some submit weekly, some every other week, some at the end of the module. There's a lot of in-class peer feedback.

If they submit everything at the end of the semester for summative assessment, they get very little feedback. For this end-of-module summative assessment they submit a portfolio of all their short pieces (12) plus a 'polished' essay (an essay which they have written for another module). She will give feedback on this essay, but otherwise uses a checklist of learning outcomes/assessment criteria which she just ticks off. She estimates in time it's equivalent to reading two essays per student – but only writing feedback comments on one. At the beginning this might take an hour per portfolio but she reckons it comes down to 30-40 minutes. However, reading and responding to the short pieces during the semester takes 6-8 hours per week. At the beginning of the semester this will represent 40-45% of students submitting their short pieces, it drops off as the semester proceeds.

Students have the assessment checklist when they submit the portfolio so it's organised in a certain way (which makes assessment easier). However she doesn't penalise disorganised students – just suggests to them in feedback they need to work on their organisational skills!

At Level 2 students take part in more peer feedback, using the forum on WOLF for discussion. Peer assessment is part of the summative assessment – they have to demonstrate they have both received and contributed to feedback and this needs to be 'ticked off' in the portfolio.
All the students keep journals. She gives them templates (structured questions) to help them write more critically and analytically. She doesn't expect to read all journal entries.

In the "Craft of Writing" module, again students are writing every week which means 12 assignments in the semester. For assessment she requires 3 and they choose 2 more they're pleased with. These 5 are the ones she reads for feedback, she doesn't offer feedback on the other 7 though she might read through them quickly. She tends to do a lot of ticking as she reads! The students like having some control themselves over the assessment of their portfolios.

In every module there's a statement inviting the students to come and talk about their work face-to-face. She expects this to be more used by Level 1 students, by Level 3 they need less input from her. So her Level 1 work is deliberately labour-intensive and she thinks this pays off in terms of fewer demands from Level 3 students.

She is constantly told by colleagues she over-assesses but the assessment is part and parcel of the students' learning in the modules – it should be seen as part of the teaching hours.

**G: Louise Waywell, University of Liverpool**

Radiotherapists (c.40 in cohort) create two portfolios during the three years of their programme, both completed during their clinical placements and intended to help them integrate what they learn at the university with their clinical experience.

The first portfolio is submitted in September of their 2$^{nd}$ year and is based mainly on their clinical placement from May to September (16 weeks). It counts as a Year 2 Semester 2 15-credit module (they get the results by December).

The second portfolio covers the Christmas placement in Year 2 (7 weeks), the summer placement at the end of Year 2 (June-September) and both Year 3 placements (second half of both Year 3 semesters). It is submitted at Easter of their final year (Year 3) and counts as 50% of the assessment for a 30-credit module at Level 3.

The portfolios are similar in terms of what they are expected to contain: a specified number of case studies of treatments/patients (4 in Portfolio One) with a maximum of 1000 words, a reflective log completed at least weekly recording significant observations and events in relation to working with patients and other team members and using equipment, and periodic summaries (at least two in Portfolio One).

The summaries are designed to draw on the reflective log. Students draw out and reflect on their strengths and weaknesses, the opportunities and barriers to learning of the placement so far cross-referenced with the reflective log, their targets and progress towards achieving these. These summaries form the basis for a review meeting with their clinical tutor of approximately half an hour where the summary is discussed. They have a minimum of two each placement, probably more. Clinical tutors don't necessarily read the reflective log but it must be available for reference and submitted with the portfolio.

The portfolios are assessed by the clinical tutors (their own students) and moderated by a member of the University staff (all fails, top, middle and bottom from same clinical site). The number of students per clinical tutor varies according to the clinical site but will range from about 8-14 students per cohort. One clinical tutor estimates that each Portfolio One takes her three and a half hours to assess, each Portfolio Two takes four hours, in addition to the time spent reviewing students' summaries face-to-face on the placement. Each portfolio gets individual written feedback. The University staff member compiles generic feedback – she estimates that moderation is a day's work.

Clinical tutors have to give a percentage mark. A very regimented and prescriptive assessment form has evolved. Students also get strict guidelines about what to include and are supposed to organise it in a certain way, with every item signed off before final submission (if they fail to do this they get 0 for presentation which loses them 10% of the mark automatically). This structure helps the assessment process.

Despite the workload, clinical tutors are positive about the portfolio and see the process of compiling it and having regular review meetings as very beneficial for student learning.

**H: Sue Ashton – Liverpool John Moores University**

The Diploma in Nursing (Adult Branch) takes about 90 in each cohort. Students take a module in Personal and Professional Development as their last module before qualifying (Level 2 module). It's a 16-week module. The assessment is a portfolio meant to demonstrate transition from a final-year student to a registered nurse. This is the total assessment for the module. Students are given clear guidelines in the introductory block of study time about how to build their portfolios – they will not have had any previous experience of portfolio assessment. This includes a clinical assessment form which is a guide to the contents.

The module has learning outcomes around professional issues (QA, Risk Assessment, Leadership and Management) a Personal Development Plan and review of Progress and also PBL activities.

In addition to Sue as module leader, there are 6-8 facilitators (FT/PT members of staff) who look after 15-20 students each. They run the PBL groups, check on students' progress (reminding them about completing their portfolios, read and comment on any drafts students want to submit and mark/grade the final portfolios. Each portfolio will consist of five sections each relating to some aspect of the l.o.s) with documentary evidence (probably), for example a mockup of a risk assessment form they might have used in their practice, and a reflective commentary. The total for all five should be c.3000 words, so around 600 per section. The commentaries are short reflective essays which should include reference to literature. Grading criteria are like other academic pieces, eg evidence of critical thinking etc. (They are graded on % scale).

An inexperienced facilitator might take an hour per portfolio, but an experienced one will probably only take half an hour. S/he will have seen some of the contents for some of the students – those that chose to submit drafts – which would make marking quicker.

Students are given a self-assessment checklist for the portfolio contents. Evaluation feedback suggests they find this useful but it is not compulsory to submit it with the portfolio (or even use it). Maybe 50% do submit it, and then it does help the assessor.

Sue moderates after first marking – the minimum required by LJMU is 15% but she probably looks at nearer to 30%.

The University is considering e-portfolio software, possibly the Bb CS system so they may migrate to electronic portfolios in due course.

**I: Judith Martin, University of Liverpool**

Yr 3 Occupational Therapy, 41 in cohort going up to 50 next year. Students have kept a portfolio since Yr 1, partly to accustom them to professional CPD requirements. They have tables of professional skills and competences which they need to acquire and evidence, and also put other evidence like placement assessment forms in their portfolio. Some of the material will have been submitted to/seen by staff and received feedback, some is personal.

For the final assessment this year they were require to submit:

- a cv (5 %)
- an annotated skills audit (5%)
- six structured and reflective commentaries with evidence chosen by Judith on key competencies eg. Managing their learning, Working with external agencies, Reflective Practice. (15% each)

This selection from their portfolio can be contained in a single plastic folder.

The annotated skills audit consists of a table of the professional skills they have to demonstrate with space for their commentary and cross-referenced to evidence in their portfolio. They can choose how much to write against each skill. They don't submit the evidence but the cross-referencing must be clear and explicit so that it is clear at a glance what is contained in the portfolio. Much of this evidence will have been seen at some stage but not all.

The structured commentaries on the competencies selected by Judith are expected to be referenced to the literature. She will select a slightly different set next time (and perhaps fewer than six!). She will have seen drafts of these during the course and given formative feedback. The commentaries are meant to be substantial: the total for this submission is 3000 words and the first two requirements are quite brief.

At a conservative estimate each file took over two hours to assess, with the better files taking longer (more substantial). Most of this is spent on the six competences. She wrote all over them as she assessed them, as she sees this as feedback towards their future professional development. She also compiled a generic feedback sheet on each competence. The first assessment was all done by her, with another member of staff moderating. She is considering reducing the number of competencies next time.

**J: Eleanor Cohn, School of Applied Science, University of Wolverhampton**

Level 1 Environmental Studies module (15 credits) – about 50 students.

Pilot this year to introduce them to the idea of e-portfolios. 2 reflections, 10% of module mark. Done on Pebblepad.

A reflection on an achievement
A reflection on a constraint on their achievement (eg poor organisational skills)

She stresses that it should be useful to them. No guidance on length, only on how to go about it. They had a deadline which gave them 2 weeks to do it in.

For her own interest she evaluated the quality of reflection as superficial (descriptive)/intermediate/deep. The reading and evaluating was not that onerous, didn't take her long. She thought it could be scaled up to, say, 200 students without difficulty and that it helped students to engage in the programme. She didn't give them a grade but offered feedback. This was in a face-to-face session along with other things eg details of the next practical session.

In another, more content-based, module, students are asked to reflect (quite briefly) on feedback they have received. She thinks that giving electronic feedback would take longer.

**K: Frank Lyons, University of Portsmouth**

Frank is the director of the Foundation Direct CETL at Portsmouth. They are currently piloting a form of portfolio assessment with the Foundation Degree in Early Years (c.30 in cohort), intending to bring 4 more FDs in next year. This is a blended learning programme in which students attend classes at the University or a local FE college and use an online environment throughout the degree (WebCT plus Dreamweaver – they will probably dump this and use a blogging tool). Students will have their own computers/laptops to store their own stuff on. 4 tutors cover 30 students.

Frank prefers to call what the students are producing a ‘narrative transcript’. Students follow two ‘long thin’ units in Professional Development, one at each level of the degree. So far the students have completed 18 months of the degree, i.e. Level 1. The PD unit supports the rest of the degree programme with online activities timed carefully to support other programme requirements eg report-writing. At the June 2006 Exam Board, external examiners complimented the course team on the PD Unit (and the IT unit) as “examples of good practice”.

The first requirement is for the students to write a ‘benchmark statement’ of around 500 words, covering their learning in the 3 domains of learning: Knowledge, practice and self. In effect they write about: what they know in theory and practice in relation to their practice areas; what they want to learn, and their personal motivation(s) or what they want to do. They were given some quotations from their own applications to start them off.

About halfway through, students participate in an online discussion, revisitng their benchmark statements, They are asked to add four things where they think they’ve developed/moved on, relating to each area of theory, practice and the self. In syndicate groups of 6/7, they have to synthesise what they have learned from this into ‘tips’ for other students and publish it in the VLE – this is to build their confidence about presenting themselves in public.

At the end of the Level, they have to create an individual version of this. They are given an example (written by the staff – they hope to use real ones in future years!) to assess and grade. The format is: Where have you moved to? – in what you know? in your skills and competences? In your aspirations?

This should be about 2000 words, equivalent in word count to a conventional essay for a 20-credit module. This is assessed and feedback is given.

The plan for the end of Level 2 is still evolving but ideas include getting students to write their own learning outcomes and trying to get them to see an holistic picture of themselves and the programme. They will carry out a $360^{\circ}$ review: they will be directed to ask a range of people including critics for feedback about themselves, write this up and discuss it with their mentor and tutor and add further reflections. They will also be required to submit either: a cv, or a learning plan or an application for a new job/promotion/an honours degree.

In all of this they are not aiming for a big portfolio with a jumble of different items but rather a consistent narrative. They are interested in getting students to take responsibility and learn lessons and habits from professional practice. For example, the students need to find ways of organising their own material as people do in the real world, rather than having the organisation imposed on them by the software tool (such as the WebCT e-portfolio tool).

**L: Tracey McCoy, University of Wolverhampton**

Students are on the Video Pathway of BA Video and Digital Media degree. Level 3 module Video Industries and Opportunities worth 15 credits, c.60 students.

She has used PebblePad for the first time this session for both teaching and assessment. For teaching she used it for resources, as an e-mentoring tool and to build her own webfolio as an example.

For assessment the students had to create two 'assets' on Pp, each worth 50% of the total marks for the module.

1. They had to create a webfolio (a series of webpages with links) in lieu of a report which was the previous assessment, equivalent to about 2200 words on the nature of the video industries and career pathways. They could share a 'thought' via Pp about how they might approach creating the webfolio around weeks 3-5 for feedback and around a third of students did this. Another third saw her for face-to-face feedback on their plan. Submission was in Week 7 to an assessment folio (actually not what Pp had in place then although they do now have specific assessment folders). Students cannot see one another's work on the gateway, although of course students could choose to share work with one another with cautions regarding collusion). Giving feedback on formative thoughts was possible but it was not possible to assess the published submissions immediately following the assessment deadline as the tutor was too busy providing guidance and formative feedback on the following component.

2. The second asset was a career plan on a particular career eg video editor. She created guidance in a webfolio and suggested students followed the structured Action Plan format in Pp. Nearly all did so, only 2 or 3 did it as a Word document. 100% submission overall. The students could share the Action Plan as they were going along and get comments on it. This was published and assessed at the end of the module.

She was fastidious about putting all emails to do with the assessments for this module in one folder, both system-generated emails and emails from students asking questions. At the end she had twelve pages (more than 360) of emails! This is not sustainable.

The marking was split between two staff with her doing the bulk. Each 'asset' took around 45 minutes at a conservative estimate, that's one and a half hours of marking per student. She got a bit faster on the Action Plans as they were a consistent format but the webfolios were all different.

Thought for next year:

- Staffing must be improved. The right ratio is probably 20:1. This is not just about assessing, it's about building the ideal relationship with the students.
- Manage students' expectations on responses. Students work at odd hours, sometimes during the night, they need to be clear that a response may take a few days.
- The technology allows for saving time when several students email with similar queries by using a blog for responding.
- Build in compulsory deadlines for certain portions as the module goes along
- Build in the expectation that if students submit pieces for formative feedback as they go along they will get it, but for the final submissions there will just be a tick sheet with the assessment criteria and a sheet of generic feedback, not specific individual feedback.  She needs to create an assessment proforma to allow her to do this.

She thinks that this type of assessment puts responsibility for learning back on the student, although staff provide pointers and resources at the start. She has found that students have responded very well to the assessment format, some choosing to use the Action Plan template in the next module because they have seen the value of it as a tool. She has already extended use of PP with level 1 and level 2 students, but is looking to build in a more sustainable approach starting with study skills at level 1.

**N: Eileen Thornton, University of Liverpool**

The Health Professions Council (HPC) is the statutory regulatory body for thirteen health professions including physiotherapy, occupational therapy, radiotherapy and diagnostic radiography, orthoptics, speech and language therapy, arts therapists, chiropody/podiatry, dietetics and operating department practitioners. The HPC is equivalent to the Nursing and Midwifery Council for nurses. It maintains the registers of qualified staff and oversees re-registration.

Qualified staff in all these professions must undertake CPD for re-registration and are expected to keep a portfolio relating to this. The HPC is currently introducing a system to manage this process. Five standards for CPD have been agreed:

- The individual practitioner must keep an up-to-date record of CPD activities. This may be in any format: some professional bodies supply their own e-portfolio, others have no specific format;
- There must be a mixture of learning activities, formal and informal, relevant to their profession. The HPC provides an appendix in its guidance listing possibilities;
- The individual has to demonstrate how they have developed quality of service to their patient/client group;
- And how their own development has benefited their particular service user.
- If required, an individual has to produce a **profile** from their portfolio to demonstrate standards 1-4.

The profile is structured into three parts: the first part gives the context of their practice; the second part is a free text commentary of between 2000 and 2500 words showing how they have met the standards and citing the evidence; the third part is the documentary or website evidence they have cited. This profile is what needs to be assessed by the HPC. Practitioners re-register to practice every two years, pay a fee to stay on the register and tick a box to confirm that they have complied with the CPD standards. A 5% sample will be drawn each year and if their name is drawn the profile must be produced within one month.

This system has just commenced so the first 'batch' will be assessed in 2008. The professions differ in size from 40030 physiotherapists down to around 1220 orthoptists. To even up the workload, different combinations of professions will be sampled in different years, starting in 2008 with chiropodists/podiatrists and operating department practitioners (both relatively small professional groups - 12500 and 8420 respectively).

The role of CPD Profile Assessor is a partnership appointment to the HPC. It is publicly advertised and those appointed have a training programme. It is planned that each profile will be looked at by two assessors, one from the registrant's own profession and the other from a different professional group. Assessors will be brought together for 4-5 days of intensive assessing. This has the advantage of assessors working alongside each other and being able to crosscheck their judgements and queries. However, the HPC cannot yet be sure that this amount of time will be sufficient to get through the whole batch of profiles to be assessed until they have run the system.

The HPC has written guidance to assessors and candidates about what is expected as evidence and on how to write the reflective commentary by suggesting key questions to be addressed. The commentary is not a piece of academic writing: it should answer the question, "have the standards been met?" Criteria have been written against each standard to help the candidate and the assessor decide whether the evidence is appropriate. The needs of practitioners in a wide variety of contexts have to be considered: for example, single-handed practitioners may find the criterion of variety in CPD activities more difficult to meet, but "I read my professional journal every month" would not be acceptable. The HPC has provided some models of profiles written by the different professional bodies, all of acceptable standard. As experience builds, examples of profiles which have not quite made the grade may also be included.

Members of the professions were concerned that the HPC would be saying to them, "give us your portfolio". Actually this would have been unmanageable. Provided they keep the portfolio of evidence, if selected for assessment they will only then have to write the reflective commentary.  The HPC has chosen the level of 5% sampling initially but hopes to be able to show that this is more than sufficient to capture an accurate picture of the professions and make sure people do undergo adequate CPD. If the procedure works well they hope to be able to drop to a 2½% sample in future.