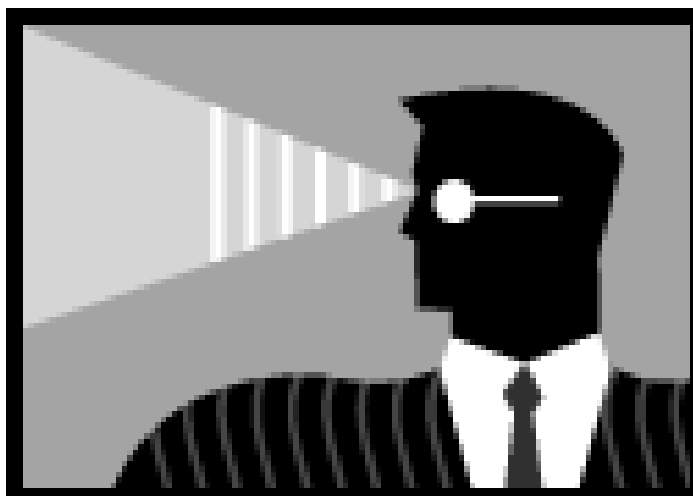# Consumer Guide to ePortfolio Tools and Services

...Making An Informed Choice

An ePortfolio is an electronic portfolio - "a collection of authentic and diverse evidence, drawn from a larger archive representing what a person or organization has learned over time on which the person or organization has reflected, and designed for presentation to one or more audiences for a particular rhetorical purpose" as defined by the National Learning Infrastructure Initiative (2003).

An ePortfolio system is "a system of production by individuals or organizations for reception and use by the creator, other individuals and organizations, made effective, efficient and electronic through the use of information and communication technology" (FuturEd, 2004).

To make an informed choice between ePortfolio tools and services, you need to ask two sets of questions:

- questions about the ePortfolio tools, systems and services, and
- questions about your organization's resources and needs.

Making An Informed Decision

YOU MAY BE:

- An individual beginning to organize and use all of your learning to apply for a job, plan a career or register for formal education

- An educator interested in providing portfolio assessment as an authentic alternative to traditional tests of learning

- A community wanting to create an inventory of community assets for planning and economic development

- A business needing to maximize human capital assets - the knowledge and skills resident in your employees

- An organization aware that you must build learning and quality into all you do, and make it clear to your customers

YOU NEED TO DETERMINE:

- What competencies - skills and knowledge - have been acquired,

- What the evidence of those competencies would be - credentials, artifacts, testimonials

- How that inventory should be created, stored, updated and utilized effectively and efficiently

You can find commercial tools to help you do those things. As a consumer wanting to review and compare them, you need to ask the following questions.

1. **Who is the producer, provider or supplier?**

1.1 What is the organization's history? Does it give you a sense of confidence?

1.2 How do you contact the head office?

1.3 How reliable and credible is the product/service?
- Is there a body of evidence or supporting research?
- Can you contact references who have bought and/or used the product / service?
- Does it come with a guarantee or warranty?

1.4 What information and consumer service is available, and how accessible is it?
- Is there any local access in your country or region?
- Is information easily available?
- Are demonstration materials available?
- Do you have a sense of the quality of customer service?
- Is technical support available - e.g., 1-800-number?

2. **What is the intended purpose?**

2.1 Is the ePortfolio focused on process or product?

2.2 What is the primary purpose of the ePortfolio, e.g., presentation of achievements, assessment of learning, reflective learning, planning and gap analysis?

2.3 Does the ePortfolio accommodate all forms of learning, e.g., formal, informal, non-formal, accidental, or incidental?

2.4 Can the ePortfolio be repurposed, e.g., from an assessment of learning to a record of achievement?

3. **Who is the intended purchaser?**

3.1 Is the intended purchaser an education institution, a human resources agency, a business or industry? Does it matter?

3.2 Is the product or service aimed at a very narrow or very broad audience - e.g., one level of education such as secondary school or assessment of learning at any level?

3.3 What assumptions are made about the target consumer, e.g., organizational needs for an ePortfolio, funding sources?

3.4 What staff will be required and involved?
- For managing the ePortfolio system, who is involved and what are the requisite qualifications?
- For creating an ePortfolio, who is involved and what are the qualifications?
- What is the nature and cost of training provided?
- What is the time and cost to your organization?

4. **Who is the intended user?**

4.1 Is the product or service for a general or a specific population - e.g., within a type of industry or with a particular educational level?

4.2 Is the ePortfolio owned exclusively by the user?

4.3 What creation process is followed?
- is it individualized or conducted in groups?
- Is external assistance required or advised?
- will external assistance be available?

4.4 Is it accessible to specific populations?
- What languages is it available in - e.g., both French and English?
- Is it barrier-free and bias-free for persons with disabilities, women, visible minorities, and First Nations?

4.5 What is the difficulty level?
- Can it be used for people for whom English or French is not their first language?
- Can it be used by people with low literacy levels?
- Does it have appeal or application to different age groups - e.g., youth, seniors?

5. **What is the nature of the product or service?**

5.1 Is there a product you own, a service to be contracted, or both?

5.2 What is the type of product - e.g., computer software, web application?

5.3 What equipment is needed?
- What general equipment is needed - e.g., hardware?
- What particular equipment or software is needed?

5.4 How are you involved in using the product or service?
- What equipment and facilities are provided?
- What time will be required of you?

5.5 What are the end results of the process or service?
- How usable is the final product to you? What is the degree of technicality?
- Who owns the information gathered?
- Are results confidential? What is the nature of the confidentiality?
- Where is the ePortfolio stored?

5.6 Are there linkages to existing or needed services such as:
- training plans or materials?
- existing management information systems?
- job classification systems and industry occupational skill standards?
- education outcomes and reporting systems?

5.7 Is the product or service "user-friendly"?
- Is the terminology generally understood or "unique" to the producer?
- Is there a glossary of terms?
- What amount and type of information is required in advance in order to use the product or service?

5.8 Is the product flexible and adaptable?
- Is the format flexible - e.g., can it be modified or changed at all?
- Is it adaptable to various industries or sectors?
- Can it be adapted to different sizes of organization - e.g., small enterprise to multinational firm, an individual school to entire system?

5.9 Is it relevant to a particular country or adaptable to any cultural context?

5.10 Is it a "living" tool or service? "
- Has it been updated and/or revised?
- How often? How recently?

6. **What is the total cost?**

6.1 Is there an initial fee and/or annual fee?

6.2 Are there licensing fees? Does this apply to multiple and/or single sites or users?

6.3 What are the ongoing costs? What does storage cost?

6.4 What is the total cost per individual ePortfolio?

6.5 Are there economies of scale - e.g., reduced cost with increasing numbers?

6.6 What are the associated purchaser costs - e.g., training, administration time, communications?

6.7 What are the customization costs?

7. **Does it meet recommended quality criteria to ensure ROI on time and energy invested?**

7.1 A digital archive and an ePortfolio are developed and owned by the individual or organization creating them. The use of both or either, and any changes to them, are under the control of the individual. Both are confidential and access is controlled by the individual.

7.2 The ePortfolio system has the capacity to maintain a complete inventory of skills and knowledge acquired by the individual through formal, non-formal, informal, accidental and incidental learning. The ePortfolio development process includes thoughtfulness about learning represented.

7.3 The ePortfolio system lists and describes skills and knowledge in a way that is recognized and respected by educators, employers, professional bodies, and others who receive and process ePortfolios. Where possible, the ePortfolio system links to established competency standards but also allows flexibility to accommodate unique or non-specific competencies.

7.4 The content of the ePortfolio is current, accurate, and verifiable. Methods of validating learning are flexible, appropriate, and credible.

7.5 To develop the ePortfolio, there are explicit instructions with examples, a universally-recognized glossary of terms, and professional assistance if required. The ePortfolio is easy to access, use, and modify by the owner.

7.6 The ePortfolio and archive have the capacity to incorporate a variety of media.

7.7 The ePortfolio is portable and interoperable in a technical sense.

7.8 The ePortfolio service is multi-purpose, customisable and adaptable to various uses, e.g., assessment by teachers, learning through personal reflection, planning, individual or community asset mapping.

7.9 An ePortfolio system is seamless, allowing the individual to create many versions of his/her ePortfolio and use this process throughout life, from primary school through higher education and career training to the workplace and lifelong learning environments.

7.10 An ePortfolio system provides secure long-term storage, privacy, access and ongoing support.

The purpose of this guide is not to judge products and services for you, but to provide a framework of questions to ask.

You may choose to rank criteria, e.g., placing more emphasis on time or cost.

Ask these questions - and others that you discover to be important to you -- not only of vendors but of other purchasers as well.

As you begin to compare ePortfolio tools and services, you need to be clear about your resources and organizational needs.

1. Where do you find information about these products and services?

You can find a large number and variety of ePortfolio tools and services on the Internet by using descriptors that combine the concepts of learning records and technology, e.g., digital skills record, portfolio assessment, prior learning assessment, electronic skills passport, career portfolio. Various papers and conferences are available at these websites and many others.

   • www.FuturEd.com
   • www.LIFIA.ca
   • www.Europortfolio.org
   • www.HelenBarrett.com
   • www.ePortConsortium.org
   • www.eradc.org/blog

2. What use do you want to make of an ePortfolio? What purpose do you want to concentrate on - e.g., process or product?

Products and services target different users and purposes. For some, the ePortfolio is about a reflective learning tool; for others, it is demonstration of achievements. Some products serve more than one purpose, others may not.

3. Are you the consumer targeted by a particular product or service?

Key decision factors will include the size and nature of your industry, the characteristics of your client group, the context you're operating within, and existing studies of your industry.

4. Do you want to purchase a product that you use - e.g., a software program - or a service which may include training, management and storage?

There will be a difference in the amount of time and finances you commit to the process if you do it yourself.

5. What human resources and equipment do you bring to the task?

Different tools require different resources - e.g., hardware and software - and some tools are very labour intensive and knowledge intensive.

6. How important are time and money to you?

You may be inherently limited by the timeframes and budget that you have.

In the end you will have to make choices between products and services. To feel you've made the best decision, MAKE AN INFORMED DECISION.

A Sample of ePortfolio Tools, Systems and Services Online:

Blackboard Content System
www.blackboard.com

e-Portfolio™ by Chalk and Wire
www.chalkandwire.com

E-portfolio online
www.eportfolio.org

Epsilen Portfolios
www.epsilen.com

Folio by ePortaro
www.eportaro.com

webfolio
www.iwebfolio.com
www.nuventive.com

Mosaic
www.rsmart.com

MyPortfolio
www.myinternet.com.au

OSP
www.theospi.org

PaperFree Systems
www.paperfree.co.uk

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