Final Report to ACODE

Professionalisation Project

Portfolios for Flexible Learning Designers/Developers

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Background and context

Introduction

Portfolios have a long tradition in the creative arts and design fields, where practitioners collect and showcase samples of their work. More recently, portfolios are being used in other professional contexts, particularly teacher education and clinical training programs, for professional preparation and development purposes. Across these various fields, portfolios fulfil various purposes: to showcase 'best work', to prepare students for a profession, as a vehicle to develop 'reflective practitioner' skills and the integration of theory and practice, to support job applications, promotion applications and so on.

In the context of higher education, portfolios are mainly described in relation to academic teaching activity. Seldin (2000:1-2), for example, says that whilst 'no recipe exists for preparing a portfolio', a teaching portfolio is:

> 'a factual description of a professor's teaching strengths and accomplishments. It includes documents and materials which collectively suggest the scope and quality of a professor's teaching performance. It is to teaching what lists of publications, grants, and honours [sic] are to research and scholarship.'

> '… flexible enough to be used for tenure and promotion decisions or to provide stimulus and structure for self-reflection about teaching areas in need of improvement.'

Portfolios, then, perform both formative functions and summative functions.

The Australian Federal Government is increasing its requirements on the higher education sector to meet indicators for the quality of university teaching and student learning, and is tying institutional funding to measurable outcomes of same. As a part of this trend, and in response to initiatives in the UK higher education sector, issues related to the professionalisation of teaching are under debate in Australia: entry requirements, continuing professional development, the articulation of standards of professional practice, and the role of professional associations in the validation and maintenance of those professional standards (see for example Dearn, Fraser and Ryan, 2002).

Portfolios potentially play a pivotal role in the professionalisation of academic teaching. Portfolios already have an established role in academic promotion processes of many universities, in the process of applying for teaching awards, and in applications for positions. Portfolios are also suggested as a means by which teachers might gain entry to professional associations and seek accreditation, as a vehicle for continuous professional development, and as a tool for probation and ongoing performance management processes.

What do these developments mean for that subset of academics working as designers/developers in the Australian higher education sector? The population of designers/developers who are currently employed in Australian universities on

academic awards is in the vicinity of 150. The majority work in organisationally centralised units, with a minority working within faculties or departments. The role which academic designers/developers play in the professional development of academic staff, and the design, development and delivery of quality curricula and flexible learning materials is dynamic, complex and of increasing strategic importance to the institutions for whom they work. The professionalisation debate focuses on mainstream academic teachers, and looks to academic designers/developers as crucial sources of support to assist academic teachers achieve professional status. But what challenges do academic designers/developers themselves face in this emerging environment?

One major challenge is the diversity amongst this community of practice. Research into designers/developers over the last 20 years in Australia, Canada and the UK tells us that this professional group:
- are employed under various titles with various duty statements
- have qualifications and experience in various fields of study
- have an ill-defined and osmotic professional identity
- have roles and responsibilities which are highly influenced by their institutional context and history
- are represented by a number of professional bodies and associations
- have roles and responsibilities which have changed over time, particularly with the introduction of e-learning
- have no obvious career path.

(see Andresen, 1991;Allen, 1996; Fraser, 2003; Bird, 2004, Schwier et al, 2004)

Other challenges relate to the evidencing of their work in general, and promotion processes in particular. They face difficulties identifying and accessing sources of evidence for their portfolios. They work with different stakeholders to those of teaching academics and the absence of student feedback as a source of evidence creates a considerable gap in the development of their portfolios.

Designers/developers employed under academic awards are disadvantaged by current academic promotions criteria, which are designed for academics who teach, engage in research and community service. They have different, and often limited, opportunities to achieve these criteria. They may not teach at all; they must argue equivalence for other responsibilities; and they may not have opportunities to engage sufficiently in research, leadership and service that are afforded other academics.

In general, this project aimed to identify a range of key parameters to guide the construction of portfolios that effectively reflect the roles, responsibilities and expertise of academic designers/developers. In turn, the development of quality portfolios will inform the development of standards for best practice, and assist in the identification of continuing professional development and career development for this emerging profession.

Aim of the project

The aim of this project was to:
> Identify the nature of the evidence, and from whom and how it can be gathered, that flexible learning designers/developers can use for the preparation of portfolios for academic promotion and professional development.

The definition of a flexible learning designer/developer for the purposes of this project was:
> Academic staff working in dedicated design/development positions who work with academics on the design and development of flexible learning curricula and materials.

Expected outcomes and deliverables

The project aimed to produce the following:
1. A resource 'How to prepare a portfolio for academic promotion and professional development' for the ACODE website,
2. A report to ACODE,
3. An ACODE workshop,
4. A conference paper or journal article.

Methodology

The research methodology was a naturalistic enquiry (Lincoln & Guba, 1984) drawing its evidence from the natural setting in which it occurs. This research used qualitative methods, drawing particularly on the data analysis approach described by Miles and Huberman (1994).

The population from which the sample for this research was chosen was identified in an updated database of flexible learning professionals developed in 2002 (Bird, 2004). The sample of thirteen (13) flexible learning designers/developers working in Australian universities was purposively selected for maximum variation of institutional setting. Volunteers who currently have a portfolio, or are actively engaged in the collection of evidence for promotion and/or professional development purposes were invited to participate.

Semi structured interviews were conducted with each participant. Interviews were of approximately one hour's duration. The first round of interviews was conducted over the telephone, and the second round were conducted at the interviewee's work place with their portfolio documents on display. All interviews were digitally recorded and then transcribed. It was originally anticipated that twenty (20) designers/developers would be interviewed. However the invitation to participate did not produce twenty (20) volunteers who fit the requirements for the purposive sample. After thirteen (13) interviews, data saturation occurred and no further interviews were conducted.

The interviews were structured around the following questions:

Background information:
1. What is your job title and academic award level,
2. What is the name and size of centre or unit within which you are employed
3. How many years have you been employed as a designer/developer
4. Can you describe you career path to date
5. Can you provide a general description of your duties

Portfolio information:
1. For what purposes do you gather evidence about your work?
2. To which stakeholders do you look when gathering evidence for your portfolio?
3. What artefacts (evidence) do you gather for your portfolio?
4. What evidence do you gather for external and/or peer recognition?
5. What processes do you use for the gathering of stakeholder feedback about your work? Which processes are instigated by you as an individual and which ones are conducted systematically in the Centre where you work?
6. How do you go about structuring and maintaining your portfolio, and writing your portfolio for promotion?
7. Would you be willing to show, and further explain, your portfolio in an in situ interview?

From the interviews a purposive sample of four (4) designers/developers participated in a subsequent interview and contributed hard copies of their promotion applications and portfolios to the research project. This sample was chosen as a 'best practice' sample – designers/developers who have well developed promotion portfolios which they were prepared to share for further analysis and showcasing. A further two (2) participants contributed their promotion applications and portfolios for analysis and showcasing without further interview.

Invitations to Unit/Centre managers to be interviewed about Unit/Centre-based systems and processes for gathering descriptive and evaluative data did not produce any volunteers. One manager was interviewed in the thirteen (13). Responses to the question: 'Which processes are instigated by you as an individual and which ones are conducted systematically in the Centre where you work?' produced sufficient data about this aspect of the research.

The data was analysed using a three-stage process described by Miles and Huberman (1994). Firstly the transcriptions of the interviews were partitioned and sorted into data which related to each of the interview questions, and were reduced by eliminating data which was not relevant. Secondly, the data was sorted and reduced again and displayed via tables, lists and summaries. Duplicated data was eliminated. Some data was not subjected to further analysis and appears as descriptive data in the section titled 'Collecting Evidence' in *Developing Portfolios A guide for academic designers/developers*. Remaining data was analysed further by theme and synthesised into the information which appears in the remaining sections of the Guide.

Findings

Background information

Whilst data gathered in the preliminary section of the interviews was not the primary focus of the research, the background information which participants provided about their job title, where they work, their career paths and their general duties adds to the knowledge base about this professional group.

As would be expected, participants worked under a wide variety of titles, and were classified at Level B or Level C, with one participant receiving a loading to Level D. Eleven participants worked in central units, and two in faculty-based units.

Participants came to their positions from a wide variety of backgrounds including science, applied sciences, psychology, education, and languages. Their previous career paths were varied and included teaching (in all sectors), educational and instructional design, management, research, and multimedia.

Participants engaged in a variety of duties, but with no duties common to all. The most commonly cited duties were (not in order of frequency) :

- Academic staff development workshops
- Curriculum development
- Teaching and/or convening foundation and postgraduate award programs
- Individual consultations with academic staff
- Designing learning materials: print, CD-ROM, web
- Project management
- eLearning and technologies
- Committees/working parties
- Research and evaluation

Portfolio practices

Processes for gathering evidence

Designers/developers in this study used a number of processes to collect evidence of their work. These included:
- Systematic quantitative and/or descriptive data collection of frequency and type of activities
- Systematic collection of evaluative stakeholder feedback instigated by the Centre or Unit in which designers/developers work
- Systematic collection of evaluative stakeholder feedback instigated by individual designers/developers
- Evidence driven by institutional folio template requirements for performance appraisal and review processes
- Collecting unsolicited feedback from a variety of stakeholders
- Keeping document trails highlighting longitudinal contributions to projects, committees, working parties and so on
- Keeping work diaries, personal reflections and other self evaluative documentation
- Keeping showcase examples of work.

Stakeholders

Designers/developers in this study looked to a range of stakeholders to provide
evidence and feedback of their work. These included:
- Individual academics
- Academics who participate in professional development seminars/workshops,
  courses
- Other designer/developers both within and external to the Centre/Unit
- Staff in other sections of the organization, both academic and general
- Fellow members from committees/working parties
- Management
- Heads of Schools, Associate Deans of T & L etc
- Editors/reviewers of journals/conference papers
- Referees from past job applications
- Professional associations
- Industry contacts
- External community service contacts
- Family members

Examples of evidence

The following table captures all of the types of evidence that academic
designers/developers might collect for either formative or summative purposes, or
both.

Type of evidence	Example
'Teaching'	
Descriptive data of activities by type, frequency and role	Number and type of one-on-one consultancies, workshops, seminars, projects, (use eg from Melbourne?) An up to date CV
Evaluative evidence from stakeholders - formal	Participant evaluations from staff development workshops/seminars – quantitative and qualitative Standard 'student' evaluations from Graduate Certificates or other award courses – quantitative and qualitative Educational Design feedback form –see Appendix X for a good example from the University of Queensland Course and unit review data
Evidence from stakeholders - unsolicited	Letters and emails of acknowledgement from individual staff, Chairpersons of Committees/Working Parties, letters of impact
Official recognition - external	Awards Industry seminars – invitations to speak, industry reps using examples of your work for showcasing purposes Invitations to do things at other universities eg talks, committee work
Official recognition - internal	Internal awards commendations, Fellowships and grants Extracts from minutes commending work done

Record keeping – document trails	Highlighting sections of documents to which you can directly attribute your own work eg minutes of meetings Keeping longitudinal or cross-sectional samples of curriculum or other project documents to show development and your contribution. Evaluation reports on the completion of a project Short reports after consultations Implementation reports Curriculum documents, maps, accreditation documents'
Peer review	Peer review of teaching Peer review of teaching and learning materials Peer review of student assessment strategies
Institutional and Unit/Centre quantitative data	Growth in numbers of units/students in WebCT/BlackBoard Hit rates on websites, resources, etc
Resources produced	Samples of screen dumps from multimedia resources Samples of print resources
Personal reflections	
Evidence of processes	Showing how you use any of the above evidence to improve your practice eg: '
Research	
	List of publications: refereed and unrefereed journals, conference papers, book chapters, books, book reviews Invitations to review/referee conference papers and journal articles Invitations to present at conferences Refereed journal publications Research grants – number and amount of money Reports and feedback from reviewers/referees Best paper awards/ outstanding paper awards at conferences Requests to sit on award committees Requests from colleagues to use publications Mock RQF reports Doctoral research Requests to sit on editorial boards
Community service	
External	• Service to the wider community: Board membership of community organisations Consultancies • Service to the discipline: Executive membership of professional associations, peak bodies, conference organising committees ASCILITE mentor
Internal	Reports Evaluations Reviews Committees/Working Parties Managerial work – planning, administration

	Policy development Strategic planning

Promotion issues

As we know from previous studies (see, for example, Bird, 2004), the roles and responsibilities of academic designers/developers vary from institution to institution, and even within institutions. Some roles and responsibilities overlap with the work of mainstream academic teachers and researchers, but many of the duties are different. Some of these areas of work pose particular problems for academic designers/developers gathering evidence about their work (irrespective of whether it is for formative or for summative purposes). As a result, designers/developers employed under academic awards face unique challenges in the academic promotion process.

The following issues about promotion emerged from the interviews for this project:
1. Promotion panels commonly don't know what designers/developers do.
2. Institutional templates for performance review and promotion are not designed for designers/developers, they are designed for teachers.
3. Not only do designers/developers have to argue their case for promotion but also have to explain their roles and responsibilities.
4. Promotion guidelines are not always clear on what approach to take in the promotion application.
5. It is easier to get promoted by changing jobs than by internal promotion process. Yet there are fewer opportunities for moving around the sector for academic designer/developers due to the small size of this professional group.
6. Difficult decisions must be made about what counts as 'teaching' and what counts as 'community service', particularly in relation to staff development and project work.
7. It is difficult to get promoted if you are an academic working in a non-academic unit i.e. having an academic context is important.
8. If the director/head of the unit/centre is not an academic, then academic designers/developers need to look elsewhere for academic mentoring.
9. For many there are limited opportunities to demonstrate leadership.
10. For many there are limited opportunities for supervision.

Conclusions

The findings from this research clearly show that designers/developers face particular challenges both in the gathering of evidence about what they do, and in the promotion process in particular. Designers/developers, and the units within which they work must create systematic processes through which they can gather evidence, from multiple sources, about the nature and quality of their work. It is anticipated that the information contained in the guide which accompanies this report *'Developing Portfolios A guide for academic designers/developers'* will assist this process by providing a significant collection of best practices harvested from the interviews.

It remains to be seen whether Australia follows the UK in formalising standards for good academic teaching and establishing an accreditation framework for continuing professional development. In the meantime in Australia HERDSA has implemented a 'HERDSA Fellowship Professional Recognition and Development Scheme' that relies on the development of a portfolio with the support of a mentor. In the UK, the Association for Learning Technology (ALT) now runs the Association for Learning Technology Certified Membership Scheme (CMALT) that requires applicants for accreditation to submit portfolios of their work.

Alongside the professionalisation debate, the quality assurance agenda requires units in which designers/developers work to show evidence of the nature and quality of their work. Whilst these units typically assist the broader academic communities with whom they work to evaluate their teaching, learning and curriculum activities, the work of the units' themselves are often poorly evaluated. Units therefore also need to develop systems of data gathering, evaluation and review that cohere with those of the individual staff who work within them.

Individual academic designers/developers will need systems, skills and support in order to develop portfolios which contribute to their ongoing professional and career development.

Recommendations for further work

Recommendation 1
That the resource *Developing Portfolios A guide for academic designers/developers* be widely advertised throughout the sector in order to support academic designers/developers towards developing portfolios for the purposes of professional and career development.

Recommendation 2
That the implications of the findings of this report on designers/developers who are employed on administrative awards be considered.

Recommendation 3
That Heads/Managers of Units/Centres where designers/developers are typically employed develop systems for the gathering, from multiple sources, of descriptive and evaluative data of the work of the Unit/Centre.

Recommendation 4
That Heads/Managers of Units/Centres where designers/developers are typically employed build portfolios into the performance management and appraisal systems of their Units/Centres.

Recommendation 5
That peak bodies in the sector (for instance ACODE, CADAD, HERDSA, ASCILITE) participate in a joint forum to progress discussion on professionalisation issues and gauge the sector's interest and readiness to form a professional association.

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