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Portfolio Visioning for the Sakai OAE

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Topics for this Talk

- Sakai OAE (Sakai 3)
- OSP Community
- Portfolio Visioning
- Portfolio MiniSpecs
- Initial Projects with Portfolios in Sakai OAE
- Portfolio Priorities for Sakai OAE
- Portfolio Issues for Sakai OAE
- Solutions!



Sakai OAE

Sakai Open Academic Environment (Sakai 3)

- Managed project
- Two universities exploring portfolio functionality
 - New York University
 - Montreal Matí on behalf of the University of Montreal School of Engineering
- Portfolio Visioning Project
 - Conducted by volunteers from the Open Source Portfolio (OSP) community
 - Participation by representatives from NYU and Montreal Matí
 - Preparation of requirements for portfolio functionality in Sakai OAE



OSP 2.X

- Collaborative project by many universities over the past decade
- A suite of interoperable tools
- Implementation in a university environment requires customization
- Version 2.7 works well
- Reporting functionality continues to be the major issue

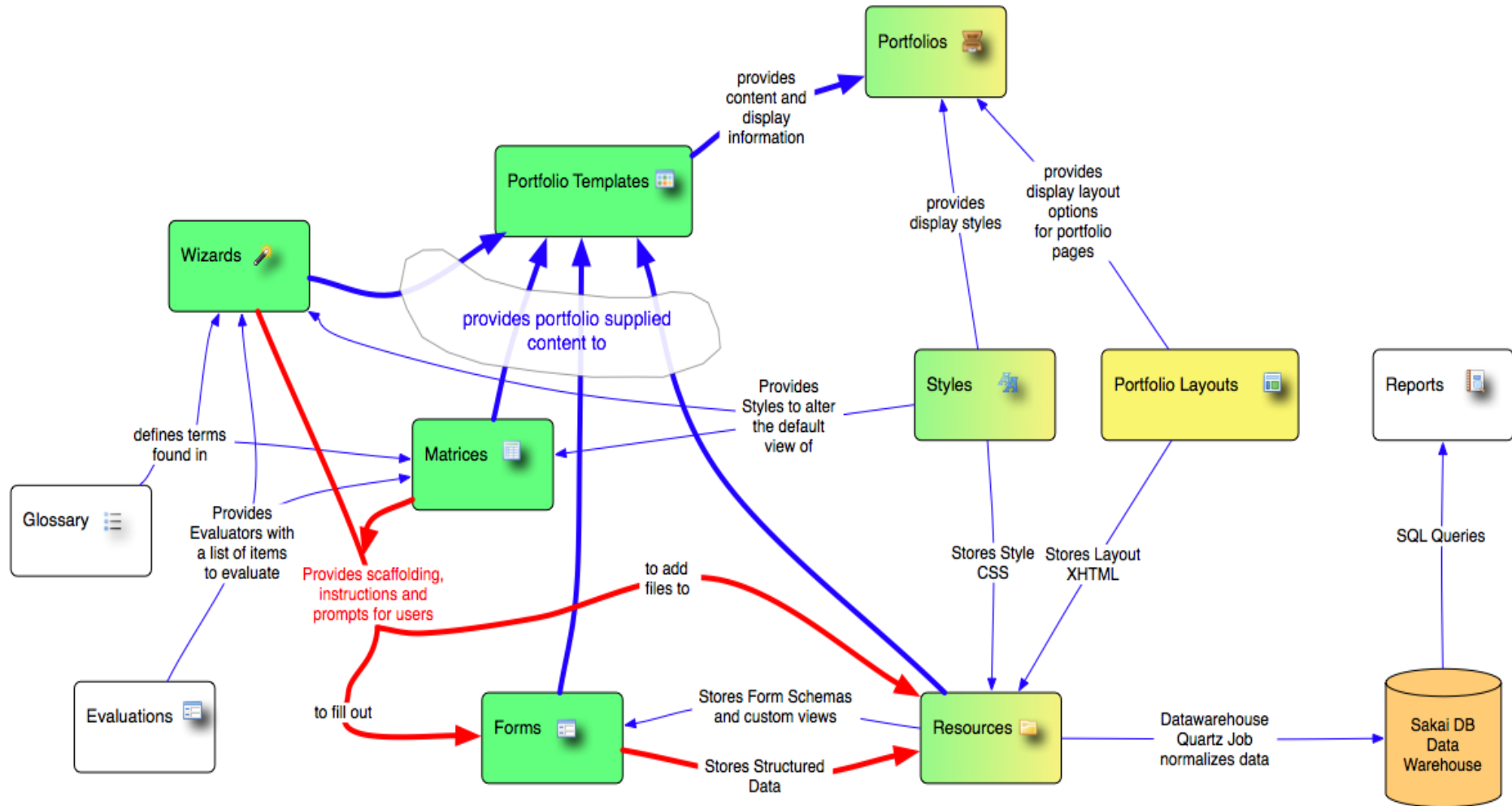


Sakai 2.7 Portfolio Tools

- Portfolio Sites
- Resources
- Forms
- Matrices
- Wizards
- Glossary
- Evaluations
- Styles
- Portfolio Layouts
- Portfolios
- Portfolio Templates
- Assignments
- Portfolio Admin



OSP Tool Interactions





OSP Community Activities

Agenda for Weekly OSP Conference Call

- Weekly Phone Meetings
- Conference Workshops and Sessions
- QA Testing and Bug Fixes
- Projects
 - OSP Help Update
 - OSP Marketing

1. Community Updates

- [Teaching and Learning \(T&L\) Group](#) updates.
- Sakai OAE.
 - General Status Update.
 - [Portfolio Visioning for Sakai OAE](#).
 - [Portfolio Reports](#).
 - [Portfolio Minispecs](#).
- [OSP Help Updates](#).
 - update sakai.properties documentation.
- OSP Marketing.
 - [Sakai Project website](#).
 - Enhanced content needed.
 - Links to additional resources needed.
 - [OSP Community Directory](#) update.
 - Recruiting OSP resources for QA or other activities.
- Planning for the Sakai LA Conference in June 2011.
 - OSP Community Activities: How to Encourage Collaboration in an Open Source Community.
 - Half-Day Pre-Conference OSP Workshop.
 - OSP Innovations.Panel
 - Portfolio Visioning Discussion Session.

2. 2.8 QA Status [Test Scripts](#), [2.8 QA Signup](#) with links to test scripts.

- High Priority Issues.

JIRA Issues

Type	Key	Summary	Assignee	Re
	SAK-20272	Throwable thrown due to poor input validation	OSP Jira Team	Alai
	SAK-20271	On editing a Glossary term an ERROR is written to the logs	OSP Jira Team	Alai
	SAK-20249	Portlets do not render in xsl-portal	OSP Jira Team	Sar
	SAK-19184	OSP Tools don't respect language/locale preferences (only when english is not the default locale) - Part 2	Noah Botimer	Bet
	SAK-18344	Add properties to allow Matrices roster	Chris Maurer	Lyn

<https://confluence.sakaiproject.org/display/OSP/Portfolio+%28OSP%29+Meetings>



<http://www.sakaiproject.org/eportfolios>

Home » Products » Sakai CLE » ePortfolios

Products

CLE for ePortfolios

A robust, electronic portfolio application with the flexibility to support a range of academic uses.

Portfolios have a broad range of use cases. They can enhance the learning process through synthesis and reflection, provide a showcase for accomplishments or support assessment. Sakai's portfolio has the flexibility to meet these diverse needs.

Students can exhibit their work

- Collect items that best represent accomplishments and learning
- Reflect upon these items and their connections
- Design a portfolio that showcases the best selections of this work
- Publish the portfolio to designated audiences

Faculty can provide guidance

- The flexibility for faculty to engage most effectively with students
- Provide structure for student work
- Review published portfolios
- Provide formal evaluation or informal feedback
- Analyze of portfolio items "in aggregate"

Organizations can assess student learning

- The tools required for program assessment and accreditation
- Review performance against learning outcomes

- Products
- About Sakai CLE
 - Learning Management
 - Research Collaboration
 - Project Collaboration
- ePortfolios
- CLE Release
- Try Sakai CLE



OSP Community Resources

- OSP Community
 - <http://confluence.sakaiproject.org/display/OSP/Project+--+Portfolio>
 - Weekly phone conference, listserv, OSP documentation and resources
- OSP Community Library
 - <http://openedpractices.org>
 - Use cases and data structures for export
- Sakai Confluence
 - <http://confluence.sakaiproject.org/confluence>
 - OSP documentation and resources
- rSmart CLE Portfolio Showcase
 - <http://www.rsmart.com/portfolios>
 - Three archetypal portfolio implementations with data structures for export
- Three Canoes Consulting
 - <http://threecanoes.com>
 - Services for Sakai/OSP implementation



Barriers to Using OSP

- Functional knowledge of the tools and how they work together
 - Takes significant time to understand
 - Studying OSP without help from the community may be unproductive
- Technical knowledge
 - Not every shop understands the XML stack, or how to apply the knowledge to OSP
- Where the technical knowledge exists, the connection to the pedagogy may not be there
 - Portfolio implementations are much more than technology projects
- Ongoing leadership is essential in sustaining the effort into the future



Portfolio Visioning Project

- Involvement
- Practice
- Structure
- Personas
- Reporting
- Mini-Specs

Agenda for March 22, 2011, Meeting

Demo of Montreal Maté Portfolio Prototype by Jacques Raynauld

- Focus on forms and reports
- How to create forms, complete and save forms, and preserve and report on the data they contain.
- Use of Sling and X Form Standard, the open source standard for forms
- A review of portfolio workflow, guiding students through a sequence of actions to complete their portfolios.
- Prototype is tailored to needs of the U of Montreal School of Engineering

Resources:

[Portfolio Minispec Workgroup](#)

[Portfolio Reports Workgroup](#)

[Portfolio Personas Workgroup](#)

[Portfolio Related Vignettes \(Portfolio Action Verbs\)](#)

[Sakai 3 ePortfolio](#)

[Sakai 3 ePortfolio High Level Design](#)

[T & L Design Lenses](#)

[Sakai Open Academic Environment](#)

[Sakai Personas](#)

[Sakai OAE MiniSpec Guidelines](#)

[Sakai OAE Task MiniSpecs](#)

<https://confluence.sakaiproject.org/display/OSP/Portfolio+Visioning+for+Sakai+3.0>



Portfolio Visioning Involvement

30 participants from a variety of institutions

- Three Canoes
- MATI Montréal
- Bexley City Schools
- Indiana University
- University of Cambridge
- New York University
- University of Delaware
- Virginia Tech
- University of Wyoming
- Stanford University
- Indiana University - Purdue University Indianapolis (IUPUI)
- University of Central Florida - College of Medicine
- University of Michigan
- BENA, Université de Montréal
- Rutgers University
- University of California-Berkeley
- Cape Town University
- Mount Holyoke College
- Antioch University
- Charles Sturt University



Portfolio Personas

Institutional Scenarios

Scenario Title	Contributor	Institution
Engineering Assessment Portfolio (EAOP)	Lynn Ward	Indiana University
History Capstone Portfolio (HCP)	Lynn Ward	Indiana University
Community Health Addition (CHA)	Robin Hill	University of Wyoming
Emergency Planning (EP)	Robin Hill	University of Wyoming
Medical registrar learning and assessment portfolio (MRLAP)	Cheryl Hodgkinson-Williams with Beverley Schweitzer	University of Cape Town
Clipper College Portfolio Process (renamed Undergraduate Learning Portfolio; ULP)	Janice Smith	Three Canoes
Theater Scene Design Course (TSDC)	Robin Hill	University of Wyoming
Wagner Graduate School of Public Service Social Portfolio (WGS)	Bob Squillace	NYU
Global Liberal Studies Heuristic Portfolio (HP)	Bob Squillace	NYU
Nursing Certification/Contact Portfolio (NC)	Bob Squillace	NYU
Teaching, Learning and Assessment Portfolio (TLAP) for Industrial Engineering (TLAP)	Nancy O'Laughlin	University of DE
Learning and assessment portfolio for teaching French (LAPTF)	Cheryl Hodgkinson-Williams with Andrew Deacon	University of Cape Town

Personas used in Scenarios

- [Garrett, Assessment Coordinator](#)
- [Fatik, first year undeclared student](#)
- [Patrice, Writing Lecturer \(secondary\)](#)
- [Anderson, Associate Dean](#)
- [Jeff, History fellow](#)
- [Dillon, Journalism instructor \(secondary\)](#)
- [Courtney, 4th year industrial engineering](#)



Portfolio Reports

Agenda for April 5, 2011, 11 AM EST Meeting:

- Update on Virginia Tech work on Reports tool
- Update on UDel work with Serensoft Form Parser
- Continuing work on Reporting MiniSpec: [Portfolio Minispec Titles by Verbs](#)
- Review of sample vendor reports (see links below)
- Finding more developers to work on reports
- Next steps for Portfolio Reports Group

Purpose of the Portfolio Reports Group

- We are addressing portfolio reporting needs for Sakai 2.x and Sakai OAE (3.0).
- We will produce a comprehensive document on current and future portfolio reporting needs to share with the community.
- We plan to work with Indiana University to upgrade the Reports tool in order to allow other institutions to make use of existing IU reports for Sakai 2.7.
- We have agreed to document our institutional reporting plans and link them to this page using the chart below.

Continuing Reporting Concerns

- What questions are we trying to answer via reports?
- What types of data are we trying to collect? (Management, performance, data for input into other tools, etc.)
- What are some sample reports?
- External reporting engines versus internal reporting tools
- Extracting form data from XML
- Planning for database requirements



Portfolio Mini-Specs

- MiniSpec Parameters
- MiniSpec titles
- Next steps in requirements gathering

Volunteers willing to work on Portfolio Minispecs

1. Debbie Runshe, facilitator
2. Janice Smith
3. Lynn Ward
4. Teggins Summers
5. Jacques Raynauld
6. Nancy O'Laughlin
7. Bob Squillace

Add your name here!



What is a Mini-Spec?

- **User goal summary:** Just a few sentences.
- **Form:** Use first person statements.
- **Terminology:** Give specific meanings.
- **Non-goals:** What does the Mini-Spec **not** address?
- **Persona-based user stories:** Use Sakai OAE personas only
- **Use cases:** List of particular actions or activities that to be supported.
- **Sample user scenarios:** A few examples of activity sequences.
- **Design notes:** Concise functional goals and concepts, but not design.
- **Mini roadmap:** Progressive implementation stage with input of development leads and project management.
- *Minispecs should generally avoid assuming the design solution in their language - the goal is to explain what should be designed **for**, not to explain the design.*



Managing User Artifacts

- **Collect:**
I want to collect, organize, retrieve and preserve examples of my work over time.
- **Select:**
I want to select examples from my collected work for purposes such as self-presentation, self-analysis, or demonstrating achievement.
- **Repurpose:**
I want to use existing or revised examples of my work in new contexts.



Working with User Artifacts

- **Document:**
I want to provide evidence of and rationale for learning.
- **Reflect:**
I want to reflect spontaneously and/or in response to formal prompts.
- **Associate:**
I want to associate artifacts and data structures (sites and tools) to each other, to learning outcomes, and to external resources.
- **Tag:**
I want label and organize artifacts such as: files, reflections, assignments, in order to be searchable by myself and others.



Interacting with Users

- **Manage Process:**
I want to be able to determine, direct, and monitor roles and permissions in the portfolio process.
- **Guide:**
I want to guide the creation of portfolios for different purposes by creating such things as: templates, assignments, files, rubrics, and prompts.
- **Establish and Assess Outcomes:**
I want to publish and map learning outcomes to course and/or program objectives in order to assess them via rubrics.
- **Give and Receive Feedback:**
I want to determine how feedback is organized and provide different types of feedback to different audiences at different levels within the portfolio process.
- **Evaluate:**
I want to be able to examine, rate, and comment on entire portfolio or their components including my own.



Sharing User Artifacts

- **Own:**
I want to make some things private and some things public in my portfolio and be aware of how my institution uses my portfolio data.
- **Empower:**
I want to take responsibility for learning and development by making choices about how data is developed and used in collaboration with instructors, advisors, and administrators.
- **Present and Express:**
I want to present information and examples of my work to different audiences in different ways (as directed by others and of my choice).
- **Share:**
I want to allow others inside and outside of my institution to view some or all of a portfolio I have permission to share.
- **Report:**
I want to gather, analyze, display, and preserve portfolio data to support institutional, programmatic, course, and individual assessment processes.



Life Long Learning

- **Preserve:**
I want to be able to be able to access and edit my data for an indefinite length of time.
- **Snapshot:**
I want to be able to freeze and save, automatically or at will, versions of artifacts or collections of artifacts at any point in time.
- **Migrate and Export:**
I want to be able to move portfolio structure and/or data within an institutional system or from one system to another.
- **Download:**
I want to copy or transfer the structure and data of a portfolio to my computer or to other devices or media without the use of a special reader.



Initial OAE Portfolio Projects

- NYU
 - Three pilot programs
 - http://www.youtube.com/watch?feature=player_detailpage&v=WeawYLLdSg
- Montreal Matí
 - School of Engineering
 - <http://vimeo.com/12392212>
 - <http://vimeo.com/13881006>
 - <http://vimeo.com/15157995>



Priorities and Issues

- Priorities
 - Assessment
 - Showcase
 - Reporting
 - Preservation and enhancement of current capabilities
- Issues
 - Lack of institutional resources
 - Misunderstanding of portfolio needs
 - Diversity of portfolio needs across institutions



Portfolio Solutions!

- Collaborative practices enhance community.
- Make the needs of the community more transparent.
- Document requirements now for future use.
- Recruit new community members.
- Support pioneer institutions.
- Seek support and resources for building our requirements