

# The Manager's Challenge: With One Toolkit, Three Scenarios and Change Management, Start the Portfolio Implementation!

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Short abstract

Seven Dutch universities have worked together on a toolkit (website) with information and documents to be used at the start of portfolio implementation. We have also developed new information for managers to help enable them to supervise the portfolio implementation process. Scenarios have been described for portfolio use (linked to change management theories) to present the options in study programmes and set the borders dividing them. Checklists have been drawn up for managers to provide insight into the right conditions for successful implementation. The speakers will also discuss the implementation experiences at their own universities.

Keywords:

E-portfolio, implementation, higher education, change management, leadership

## 1. Background

At the moment, the entire Dutch higher education system is devoting more attention to competence-based learning and skill development. The use of an e-portfolio makes an important contribution in this context. There is more and more recognition every day of the opportunities using the e-portfolio can provide. Examples of good practice have already been described in the Netherlands, especially in the occupationally oriented curricula such as Teaching, Medicine and Small Business. The challenge now facing the Dutch higher education system is to expand portfolio use over entire universities and consortiums of universities. The next step will surely be to link portfolio use in the education column so the e-portfolio can support life-long learning.

On the initiative of SURF and ALT, an expert meeting [1] held in April 2004 was attended by portfolio experts from the Netherlands and the United Kingdom. It became clear there that pilots are being widely conducted in the Netherlands and knowledge is being compiled that can be extremely useful to other European countries. We would like to take an initial step in that direction in this paper.

There is a tradition in the Netherlands of various universities working together and widely distributing the results. This was the case first with the SURF E-folio [2] project in September 2001 - September 2003. The final result was a handbook in print and web-based with descriptions of a number of portfolio applications in the Netherlands <http://iclioniis.fsw.leidenuniv.nl/surf-efolio/index.htm>. SURF had opened a website earlier with a discussion forum: <http://www.edusite.nl/portfolio>.

As in other European countries, there was a great need for an exchange of experiences and material, certainly when the first portfolio tools became available. In 2002 the Digital University (DU)[3], a consortium of ten universities, introduced a portfolio tool that could be used by various educational universities and commercial firms in the Netherlands. In response, a project was launched in 2003 for the further support of the comprehensive application of e-portfolio at a university. This project expanded on the experiences of the SURF E-folio project. In this paper, we describe how this happened.

## 2. Digital University Project Portfolio Implementation Instruments

The project started in February 2003 and went on for fourteen months. Seven large universities took part and seven portfolio experts worked together on the project, each for one day a week. The underlying idea for the project can be formulated as follows [4]: "In particular, the pedagogic implementation is extremely important and should be prepared with the utmost care because the actual practice of portfolio is tricky and often leads to disappointments (see *Portfolios* by Driessen et al. [5]). By pedagogic implementation, we mean the preparation, the roll out in the organization, the evaluation of the first pilots and the adjustment of the various instruments. ...

It is clear from the experiences of pilots in the DU as well as the SURF framework that especially for this implementation, there is a great need for supportive instruments the study programme can make use of ...”

At the moment there is one (SURF) Edusite/portfolio website in the Netherlands with a manual and a book called *Portfolios* (Driessen et al.) that recounts the experiences of a number of universities. There is still not much written material that is freely accessible and can be used by a university to support the implementation, such as an example manual that can be adjusted by a university department to suit its own situation. Now every university has to invent the wheel all over again, which is an unnecessary waste of time. The aim of this project is to accelerate the process, and help get the wheel turning faster. Semi-finished products can easily be adjusted by universities to suit their own situation and can provide departments with a wide range of examples to give a head start.

Instruments will be developed in this project for the following target groups:

- education management
- staff and policy workers responsible for the proper use of a portfolio system and
- portfolio teachers, supervisors and mentors.

The instruments are to be developed by a number of participants in the DU and in conjunction with the SURF group E-folio, the already existing material and knowledge will be elaborated upon. The instruments can be used for every digital portfolio system and will not be specifically linked to the DU portfolio system.

As its points of departure, the project group will see to it that the products fit into a system and educational concept centred around competence-based education and the students' own responsibility for their learning. It should also be emphasized that the pedagogic component is not linked to the selected platform.”

To get a clear picture of the material required, a need study was conducted among counselors, developers and managers. The material was to be put on a website and easily accessible. There was to be a clear link on the site to the SURF E-folio site and the site would elaborate upon it. The project followed the DU project management method with the various completed stages (definition [four months], design [two months], realization [six months], completion [two months]), with the monthly reports to the DU Office (state of affairs and financial overviews), with reviewers and so forth. The duration of the project was seventeen months. On 17 June 2004, the website was launched at <http://www.du.nl/portfolioimplementatie>.

### **3. Results**

The results of the project are:

- A website with examples of complete manuals, separate assignments for students and example portfolios.
- Special material for managers: checklists for implementation, overview of Dutch portfolio implementations
- Special workshops and presentations for managers.

#### **3.1 Portfolio implementation website**

The project resulted in the website at <http://www.du.nl/portfolioimplementatie> with the following structure:

- manager's section
- project leaders'/tutors' section
- example manuals for students and teachers/tutors
- examples for each item or instrument
- example portfolios.

publicaties

print

DU  
Digitale Universiteit

Marij Veugelers print

## Welkom op de Portfolio Implementatie website

Op deze website treft u materialen aan die van pas kunnen komen bij de onderwijskundige implementatie van een portfolio bij uw opleiding. Deze site bevat de ?kennis? en de projectresultaten van het DU project ?Portfolio Implementatie Instrumenten?.

De collectie bestaat uit:

materiaal voor begeleiders en projectleiders	het portfolioproces opdrachten voor studenten informatie voor coaches
handreikingen voor managers	succesfactoren veranderingstrategieen portfolio landschap checklisten
handleidingen voor studenten en begeleiders	achtien handleidingen zijn beschikbaar gesteld
de handleidingen per item uitgewerkt	op speciaal verzoek zijn uit alle handleidingen enkele items gebundeld
voorbeeldportfolio	een aantal voorbeelden uit de instellingen

Portfolio Implementatie

- projectleiders - begeleiders
- managers
- handleidingen
- items student handleidingen
- items begeleider handleiding
- voorbeeldportfolio

Project leaders / tutors section

Managers section

Manuals for students and tutors/teachers

Different items in the manuals

Example portfolio

Via de rechter menubuttons komt u in een deelwebsite; waarbij u links de subhoofdstukken kunt aanklikken.

We adviseren u om eerst te kijken bij het hoofdstuk voor managers en daarna te kijken bij het verzamelde materiaal voor begeleiders en projectleiders.

Het betreft bestaand materiaal dat zelf gebruikt wordt bij een aantal hogescholen en universiteiten aangesloten bij de Digitale Universiteit, respectievelijk Hogeschool van Utrecht, Hogeschool van Amsterdam, Saxion Hogescholen, Hogeschool INHolland, Universiteit Twente, Universiteit van Amsterdam en de Vrije Universiteit. Omdat de instellingen het portfolio voornamelijk gebruiken als ontwikkelingsinstrument, zijn de materialen op deze website voornamelijk gericht op ontwikkeling. Desondanks zijn er ook materialen verzameld die gebruikt kunnen worden bij de implementatie van een

Fig 1.: Homepage DU Portfolio Implementation Website

The material can be rapidly comprehended. Scrolling is virtually unnecessary; users just have to click onto the screens and files. Choosing from the wide range of available material makes the website more convenient to use. More than a hundred documents can be downloaded and used. A few new instruments have also been developed to support the pedagogic implementation. We elaborate upon a few examples in the material for managers.

OP PORTFOLIO IMPLEMENTATIE

Competenties  
POP  
Coachvaardigheden  
Intervisie  
Feedback  
Studiekeuze  
CV  
Beoordelen  
Portfolio proces  
Reflectie  
Zoek

Marij Veugelaers print

**Personal Development Plan**

**POP Persoonlijk Ontwikkelings Plan**

Bij een portfolio staat vaak een persoonlijk ontwikkelingsplan centraal. We laten hier een aantal voorbeelden van handleidingen/instructies zien voor studenten. Bij sommige opleidingen wordt nog niet zo expliciet gesproken over een persoonlijk ontwikkelingsplan en vindt men vergelijkbare opdrachten in het kader van de studieloopbaankeuze (zie map Studie keuze opdrachten).

Voorbeelden: (de documenten staan onderaan deze pagina)

- HvU Handleiding voor deeltijdstudenten Economie en management en een POPformulier
- Saxionhogescholen: handleiding POP
- VU handleiding Personal Development Plan (engelstalig) voor studenten bij het studieonderdeel Environment Recourse Management (ERM)

In DU verband wordt er op dit moment ook gewerkt aan het project Competentiegericht toetsen. Dit project komt tegemoet aan de behoefte van opleidingen die werken met competenties en deze digitaal willen toetsen. Er zijn in het verleden opleidings specifieke intake- en peerassessments ontwikkeld op basis van competenties die onderscheiden kunnen worden. Deze competenties worden in dit project verder meetbaar gemaakt. Hiervoor wordt een databank met competenties en hun componenten gemaakt. Verder worden digitale instrumenten ontwikkeld om deze competenties te meten en een systeem dat de keuze van competenties en toetsvorm ondersteunt. Er is sprake van de ontwikkeling van een 360 graden feedbacktool.

We hebben zoveel mogelijk de originele layout van de teksten gebruikt. Soms kan dat verstoord zijn door het DU sjabloon.

bron: DU Projectteam Portfolio Implementatie  
laatst gewijzigd: 15/06/2004

**documenten:**

- HvU POP- en portfolioinstructies Deeltijd.doc (167 Kb)
- HvU Popformulier.doc (94 Kb)
- POP VU engels.doc (82 Kb)
- pop Saxion.doc (99 Kb)

Portfolio  
project  
begele  
manag  
handle  
items s  
handle  
items b  
handle  
voorbe

Example documents from various universities that can be downloaded and used

Fig.2: Example of Material for Tutors and Project Leaders (DU Portfolio Implementation Website)

### Example material

A great deal of material has been collected, especially for the development portfolios. Examples have been put on the site with instructions for students and teachers. Appropriate segments of the instructions have also been classified separately. Example portfolios of students are also shown for each of the portfolio application scenarios (see Chapter 3.2.2).

### 3.2. Material for managers

The instructions for managers are presented as an essay of nine screens that documents are linked to. A portfolio landscape has been added with good practice from the Dutch higher education system. Checklists have been added for managers, who can use them to determine their own position as regards several views of implementation.

The screenshot shows a web page titled "Materiaal voor managers" from the "PORTFOLIO IMPLEMENTATIE" website. The page is structured as follows:

- Navigation:** A top bar with "managers" and "PORTFOLIO IMPLEMENTATIE" (with a back arrow). A right-side menu lists "Portfolio In", "projectleide", "begeleiders", "managers", "handleiding", "items stude", "handleiding", "items begel", "handleiding", and "voorbeeldp".
- Left Sidebar:** A list of menu items: "Waarom een portfolio?", "Portfolio in het onderwijs", "Een portfolio dat bij u past", "Succesfactoren", "Grip krijgen op veranderen", "De juiste veranderstrategie", "Portfoliolandschap 2003", "Checklist Implementatie", "Beschikbare Instrumenten", and a "Zoek" (Search) button.
- Main Content:**
  - Author: Marij Veugelers (with a print icon).
  - Title: "Materiaal voor managers".
  - Text: "Implementatie van een digitaal portfolio vergt een grotere inspanning van de onderwijsorganisatie dan bijvoorbeeld de invoering van een digitale leeromgeving. Een digitaal portfolio invoering raakt het hele onderwijsproces, zowel inhoudelijk als organisatorisch. Vaak zien we ook dat de invoering van een digitaal portfolio gekoppeld is aan een onderwijsvernieuwing. De projectgroep Portfolio Implementatie is zich bewust van de cruciale rol van de onderwijsmanagers in deze vernieuwingsslag en heeft daarvoor speciaal materiaal verzameld en zelf ontwikkeld dat gebruikt kan worden binnen hoger onderwijs instellingen."
  - Section: "Achtereenvolgend gaan we in op:"
  - Bullet points:
    - Waarom een portfolio: welke argumenten zijn er om een portfolio te gaan introduceren.
    - Portfolio in het onderwijs: de plaats van het portfolio in het onderwijs.
    - Een portfolio dat bij u past: er zijn drie scenario's ontwikkeld om de ambitie van de organisatie te concretiseren.
    - Succesfactoren: een overzicht van de succesfactoren.
    - Grip krijgen op veranderen: bij de invoering van een portfolio is het belangrijk om inzicht te krijgen in de verschillende veranderingsstrategieën.
    - De juiste veranderstrategie.
    - Het portfoliolandschap 2003: overzicht van de portfolietoepassingen in Nederland gekoppeld aan de drie scenario's met vele doorverwijzingen.
    - Checklist voor de implementatie van een digitaal portfolio.
    - Beschikbare instrumenten.
  - Text: "Via de linker tekst buttons komt u in de verschillende subhoofdstukken. We adviseren u om de subhoofdstukken in deze volgorde te doorlopen om zo een beeld te krijgen van de samenhang in portfolioimplementatie ? onderwijsvernieuwing - veranderstrategieën. Een aantal documenten voegen wij toe die te downloaden zijn zodat u die kunt gebruiken tijdens uw implementatietraject in de organisatie."
  - Text: "Eventueel kan de projectgroep Portfolio Implementatie u ook ondersteunen bij dit traject. U kunt contact opnemen met de Projectleider Marij Veugelers [m.h.c.h.veugelers@uva.nl](mailto:m.h.c.h.veugelers@uva.nl) tel. 020 5253293"

Fig. 3: Material for Managers with 7 Steps in Change Management Thinking and Implementation Checklists (DU Portfolio Implementation Website)

Instructions are given in the manager's section for managers or project leaders dealing with portfolio implementation routes. An important part of the instructions is the division into three portfolio application categories: *three portfolio scenarios*. This generates three coherent approaches to higher education in which portfolio can play a meaningful role. The division provides an opportunity to accord a place to good practice and indicate what good practice is relevant. The scenarios can be utilized to make the aims explicit and use the instruments and checklists in keeping with the particular scenario. Since introducing portfolio is not an isolated change but one that stands for changing the conceptual approach to education, a comprehensive implementation often comes up against aspects pertaining to change management.

The project has given instructions for a science-of-change approach to portfolio implementation for each of the three scenarios. This makes it more feasible to set priorities for management tools that are to play a central role in the e-portfolio implementation route.

The following parts of the manager's section are discussed below:

- portfolio in education
- a portfolio that suits your needs: three portfolio scenarios
- change management in scenarios
- implementation checklists for managers.

### 3.2.1. Portfolio in education

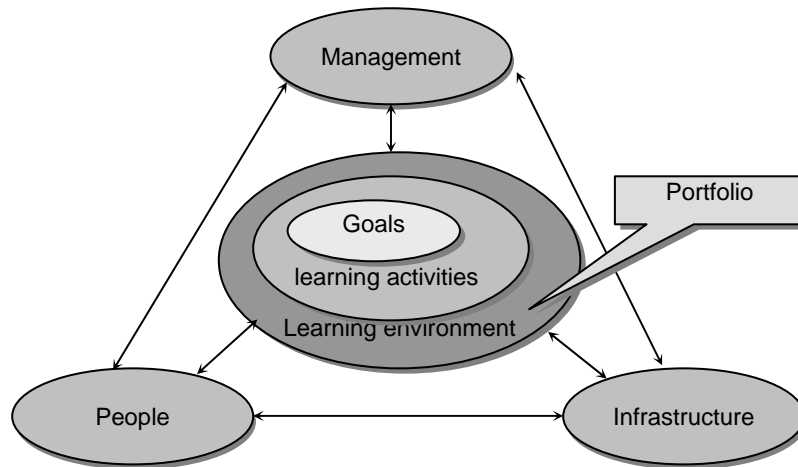


Fig.4: Portfolio and Educational Innovation Attention Areas (Van Tartwijk et al. inspired by Rubens and Schmitz)[6]

Educational innovation with the digital portfolio touches upon numerous aspects of education and how it is organized. This is illustrated by Tartwijk's model shown in Figure 4, which is based on the work of Rubens and Schmitz (2002). The concentric structure of the model is based on a goal-oriented approach to the study programme. What aims are to be achieved? How do we want to do that? What instruments are we going to use? For successful educational innovation with a digital portfolio, this model poses two research questions:

1. Does the use of portfolio fit into the learning environment?

The effectiveness of study activities can increase with the use of portfolio in the learning environment. The question however is in what context and in what form can the application of portfolio increase the effectiveness of the learning?

2. Are the basic conditions properly managed?

Rubens and Schmitz cite three important basic conditions for an effective use of portfolio in education: people, management and infrastructure. How can these basic conditions be managed in such a way that they support rather than obstruct the implementation?

### 3.2.2. Three portfolio scenarios

In Dutch higher education, there have been numerous unsuccessful experiences with portfolio applications. Driessen [5] notes that despite ample enthusiasm about the introduction of portfolio in higher education, there have been very few successful adaptations: the "portfolio paradox". What can be the reason for these disappointing results? In the epilogue to the book by Driessen [5], the author joins the pilot leaders in looking back at the experiences with the use of the portfolio. One striking statement in this evaluation is that the pilot leaders view the three basic conditions for the use of the portfolio - people, management and ICT - as the most important factors in the success or failure of portfolio implementation. This was the first step towards understanding the phenomenon. To get an impression of the widely divergent portfolio-related experiences, the various successful portfolio implementations in Dutch higher education have been analysed in the DU project. This has led to a portfolio landscape, i.e. a classification of portfolio applications according to their width and depth. Width stands for the number of students involved in the application and depth for the extent to which the portfolio applications are interwoven with the educational system. The portfolio applications can thus be classified into the following three scenarios:

- a scenario in which portfolio is mainly used in one longitudinal component of the curriculum focused on counseling students
- a scenario with a certain coherence in the educational programme focused on competence development; portfolio is used for counseling and assessing
- a scenario with a certain extent of demand steered competence-based education.

Figure 5 shows the 2003 portfolio landscape in Dutch higher education.

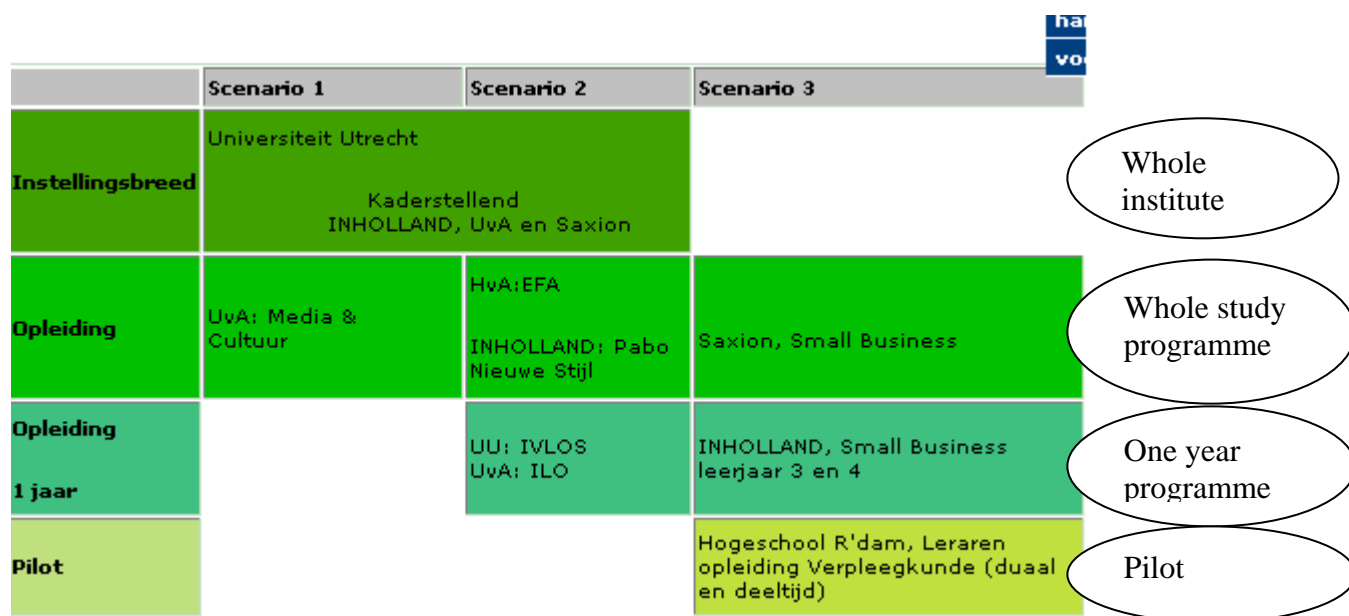


Fig.5: 2003 Dutch Higher Education Portfolio Landscape (DU Portfolio Implementation Website)

On the basis of this classification, three coherent approaches to competence-based education are described as three portfolio scenarios.

*Scenario 1 - Portfolio applied to part of the study programme*

Portfolio application is focused on counseling (personal development and making choices) and is not integrated into all the educational activities. Not all the teachers have a counseling assignment. Implementation can be carried out for each individual project.

This scenario pertains to an educational approach where a route for study career counseling or academic schooling is introduced that does not necessarily have much impact on the existing learning environment or learning activities. The activities in this route are mainly focused on counseling in personal development and making choices and/or a selected number of ethical questions. The activities are more or less independent of other learning lines. Some of the teachers are however involved as guidance counselors. The counseling is primarily focused on a clear number of tasks.

If study career counseling is put into practice this way, students can indicate that it does not contribute enough to their studies. This can be dealt with by giving credits to the counseling route. By combining the counseling with other educational activities, counseling can gain significance. In scenario 2, there is evidence of an inextricable link between the learning and counseling.

*Scenario 2 - Portfolio applied to integrated education*

Portfolio is focused on counseling and evaluating. Portfolio is integrated into all the educational activities. All the teachers have counseling and evaluating assignments as regards student portfolios. It is essential in the implementation that human resources management and performance and competence management are effective. The switch to working with portfolio is not that easy for every teacher. The organization should give the teachers whatever support they require.

This scenario pertains to an educational approach where all the study activities are focused on attaining the educational qualifications. The professional profile expressed in competences plays a central role. The structure of the study programme is more or less fixed. Certain selection options have been incorporated.

The portfolio in scenario 2 is frequently characterized by a fixed format in which students can register proof of their progress and reflections according to the structure of the study programme. This fixed structure supports the counseling. Almost all the teachers all the teachers are involved in the counseling as well as the evaluating of the students' competence. In these roles, they are expected to have an overview of the teaching activities and the entire professional profile.

As a result of the targeted teaching approach in scenario 2, students can indicate that it would be in their interest to do an individual study route to effectively attain their educational qualifications. Allowing students to plan and organize their own learning activities gives the personal development plan and the personal activity plan a central role in their education. This is done in scenario 3, where their education is demand-steered.

*Scenario 3 - Portfolio applied to demand-steered education*

Portfolio is used in demand-steered education. Students design their own educational route and organize their own tests. There is no longer any semblance of an educational curriculum. The conversion to this scenario is extremely far-reaching. In practice, successful examples only emerge around teachers with explicit views on this approach. For comprehensive implementations to succeed, visionary leadership, spunk and charisma are required.

This scenario pertains to an educational approach focused on counseling and facilitating. There is no study programme. Students plan their study activities independently and focus in this framework on the educational profile or a personal profile. Students organize their own tests on the basis of fixed evaluation criteria.

The main task of the teachers is to counsel the learning process. They support the students in designing their individual routes, in the progress of their studies and in the preparations for assessments. Students are expected to take responsibility for their own studies. They independently go through the cycle of planning, implementing, evaluating and adjusting.

The three portfolio scenarios described above differ as regards the extent to which portfolio is linked to the educational activities and the extent to which the steering of the educational activities is done by the students themselves.

**3.2.3. Change management in scenarios**

The impact of the change process is quite different in each of the three scenarios. The differences emerge because the scenarios have different impacts on how the educational activities are organized. In scenario 1 for example, not all the teachers are involved in the changes, though this is the case in scenario 2, and in scenarios 1 and 2, there is a programme of educational activities that the students take part in, whereas in scenario 3 the planning of the students themselves steers the educational activities.

	<i>Description</i>	<i>Features of the change route</i>
<i>Scenario 1</i>	Supply-oriented education Portfolio as learning line in education	Part of the teaching staff directly involved Portfolio is an extra/new activity Results are described
<i>Scenario 2</i>	Supply-oriented education Portfolio strongly linked to education	All of the teaching staff directly involved All the activities are linked to portfolio All the teachers are trained and counseled
<i>Scenario 3</i>	Demand-steered education Portfolio steers the education	Enthusiasm and idea are what matter There is no clear picture of the final result Organization is completely changed

Fig. 6: Three Portfolio Scenarios with Features of Change Routes (DU Portfolio Implementation Project)

In 2002 De Caluwé and Vermaak [7] wrote a manual about change and distinguished five change strategies, giving each of them its own colour. On the basis of the features, the change routes can be given their own colours according to the scenarios.



### **Scenario 1 stands for a blue change**

Scenario 1 pertains to a change that only applies to part of the curriculum. Credits are often linked to this part, and the implementation is in the hands of several teachers, who are either already intrinsically motivated to take part in this activity or at any rate do not have any serious objections to it. The change can be set up in a more or less project-oriented fashion. The results are fixed in a blueprint, for example of a study career route or a route for academic schooling. Scenario 1 stands for an introduction of a portfolio that can be launched in a project-oriented manner.

### **Scenario 2 stands for a green change with a red emphasis**

Scenario 2 pertains to a far-reaching change. All the teachers are involved in the process. All the educational activities including the counseling are focused on the competence profile. Whoever is doing the counseling and evaluating is expected to be well aware of this and of the fact that their activities are to take place in the framework of the students' competence development. There is a cultural shift in such a way that teaching becomes an explicit responsibility of the team. Students collect proof of their progress and reflections on their competence development in a fixed format. Scenario 2 stands for an introduction of a portfolio that can be viewed as a growth model. Teachers need the opportunity and supervision to develop in their new roles. In addition, it is important to clearly indicate that the organization will be setting different goals and the teachers will be asked how they can contribute towards them. The use of HRM instruments can confirm the need for this.

### **Scenario 3 stands for a white change**

Scenario 3 pertains to a change that is extremely far-reaching as regards how the education is organized. The change process is a spontaneous development, the result of which is unpredictable. In the Dutch examples (see the 2003 portfolio landscape), one or more individuals always play a central role in the educational innovation, and they have had an opportunity to elaborate upon their views and put them into effect. This development is not preceded by a blueprint or comprehensive educational concept. The parties who are directly involved are immersed in the process. Managers and administrators who are at a greater distance see this educational approach as something a bit alien and can have various responses to it. The white change can for example be viewed as a good practice that ought to be supported, but it can also be viewed as an "unsteered" development that should be observed with a certain extent of distrust.

Each scenario has its own dominant colour: blue, green or white. The selection of this classification is also evident in the ideas of Jaap Boonstra. In 2003, Boonstra drew up a model-oriented approach for choosing from various change strategies. This approach is in keeping with the colour theory formulated by De Caluwé and Vermaak. Boonstra works from the nature of the problem and the appropriate solution direction and approach. His decision to choose a blue or green or white change is in keeping with the portfolio scenario classification with the proposed change strategies. Boonstra also states that the yellow and red change strategies are applicable on all the change routes. For each change route, it is necessary to work on commitment and adjust the HRM policy to the change.

Checklists have been developed in the project to support portfolio implementation routes. Figure 7 summarizes these checklists.

### 3.2.4 Checklists implementation

<p><b>Special points that deserve attention in formulating the educational concept</b> <u>Special points that deserve attention in formulating the educational concept</u> These special points that portfolios play a role within are cited in the book by Tartwijk et al. on working with an electronic portfolio.</p> <p><u>Check on coherence</u> Instructions for a check on the coherence in counseling for each stage of the education route. Three scenarios have been formulated in this framework to support educational developers and managers in explaining their aims and to design the counseling route in a consistent fashion.</p>
<p><b>Special points that deserve attention in implementing a digital portfolio application</b> <u>Instructions for implementation routes</u> have been developed in the Education and ICT Policy project of the Digital University, for example for the implementation route of a digital portfolio.</p> <p><u>Education and ICT: Management checklist</u> The checklists in this document have been designed as instructions for managers, especially for managers on the work floor. They give guidelines derived from good practice. The reality these guidelines apply to is not a static entity. New experiences lead to adjustments in the guidelines.</p>
<p><b>Special points in each scenario</b> Each scenario makes specific demands in the fields of educational organization, change strategies and the counseling and training of teachers. In an overview, tips are given for the critical success factors of each scenario.</p>
<p><b>Special points for the manager</b> What skills are expected of the change manager? Can the change route be characterized by a certain colour? This requires specific <u>managerial skills</u>. An overview shows which skills the change route requires of your study programme. With a <u>colour test</u>, you can see which colour you are thinking and acting in during the changes</p>

Fig. 7: Portfolio Implementation Checklists (DU Portfolio Implementation Website)

## 4. Conclusions and recommendations

The project has succeeded in collecting portfolio material from a variety of contexts and presenting it conveniently on a website. The initial reactions indicate that the material is accessible.

Various study programmes have adopted the scenario model to test their aims as regards the use of portfolios. It is surprising that study programmes sometimes opt for a development in the application of portfolios, and consequently a development in the conceptual approach to education. We might speak of opting for a dynamic concept of education. One example of opting for a dynamic concept of education is the group of five Schools of Economics at INHOLLAND University. They have pledged to start educating in Scenario 1 and then continue developing to Scenario 3.

It would be wise to conduct further research into the steps in the dynamic concept of education as described above. Can the steps be properly supervised and can they be explicitly circumscribed in tests?

Cooperation adds a broader context to portfolio applications. In academic education, examples can mainly be found of portfolio use for the development of academic skills. In professional higher education and occupation-oriented study programmes, a focus on competence plays an important role, with the curriculum being demand-steered to varying extents. These differing approaches to portfolio applications have enabled the project group to design a website for an extremely wide audience. On the basis of this wide expertise and the compilation of portfolio research, the next step in educational innovation can be taken with the e-portfolio in the Netherlands as well as abroad.

A number of project members attended the SURF-ALT expert meeting and gave presentations at the SURF ALT Conference, Online Educa Berlin 2003 [8] and EUNIS 2004 [9]10]. The compilation of expertise in the Netherlands expanded at the Special Interest Group NL-Portfolio recently founded

by SURF, a group of portfolio experts who are going to incorporate their expertise and see to its further development and cooperation in the Netherlands as well as abroad.

We describe at the end how the electronic portfolio is implemented at INHOLLAND University and the Universiteit van Amsterdam.

## Portfolio implementation at INHOLLAND University

INHOLLAND University has formulated one joint educational concept [11] for all its Schools and used one and the same introduction route for all of them. It is a plan for competence-based education that explicitly cites the use of a counseling and assessment portfolio [12]. INHOLLAND University emphatically stimulates students to attend some of their classes outside their own school. To support this aim, INHOLLAND University has selected one ICT environment and one digital portfolio system for all fifteen of its Schools. This portfolio is structured on MS-Sharepoint and is a component of the Intranet.

When	What
August 2003	One educational concept for all fifteen Schools with one step-by-step plan to be launched in September 2004
September 2003	Decision to use one digital portfolio system
July-August 2004	Construction of INHOLLAND portfolio
September 2004	All first-year students start with competence-based education
2004-2005	All 13,000 first-year students use the digital portfolio as study aid

Fig 8: INHOLLAND University Digital Portfolio Implementation Route

Competence-orientated education has been collectively or independently designed by the separate Schools at INHOLLAND University. Various of the Schools have adopted the model of the scenarios to test their aims as regards the use of portfolio. It is surprising that a number of Schools have opted for a development in the application of portfolio and consequently a development in the conceptual approach to education. We might speak of their choosing a dynamic educational concept. An example of this is the group of five Schools of Economics at INHOLLAND University. They have opted for the following development:

When	What
Year 1	Scenario 1 with portfolio as instrument for counseling in personal development and supporting choices in the major-minor model
Years 2 and 3	Scenario 2 with all the educational activities focused on the educational profile expressed in competences
Year 4	Scenario 3 in the last part of the study programme, with students independently choosing their learning activities and organizing their assessments.

Fig 9: INHOLLAND University, Schools of Economics Digital Portfolio Implementation Route

The selection of one educational concept, one introduction route and one digital portfolio system is an example of the INHOLLAND University change management strategy.

A top-down approach was chosen because in introducing the portfolio, INHolland is emphatically focused on turning the whole organization around. A project-oriented approach is being used with tasks and hours and targeted support. It is a huge project with a considerable budget that is comparable to the implementation route of the Blackboard electronic learning environment.

In addition, each School has developed the new curriculum for the first year according to a plan of action. This approach goes well with the portfolio application most of the Schools have in mind: scenario 1 with portfolio applied in the study career counseling. The two Schools that have already had five years of experience working with scenario 2 have designed the new programme this way again. In their view, the project-oriented change was especially needed to design the new major-minor structure.

For many teachers and students, working with portfolio is new. This is often the case with teachers who work as study career counselors. The study career counselors at each school have attended a special portfolio training course. The course consisted of a part focused on the scenarios and a part for practicing the use of the new portfolio system. To further support the implementation at the Schools, each School has appointed one teacher as portfolio contact person. This teacher is given a training as "super-user" and will be the person to go to at the School with questions about portfolio.

Students are to be given a short course on the portfolio system by their study career counselor. The application in the first year is to be procedurally approached: the frequency, documents and titles are to be prescribed by the School. Students have a quick reference and a comprehensive manual at their disposal. There is a special portfolio email address if they have any questions.

As regards the change route, INHOLLAND University has adjusted all the change colours.

Blue and yellow stand for a project-oriented approach and the selection of one system, one route and one concept. These choices have been fixed by the group of School directors and the directors have incorporated them in their business plans.

Red stands for the new roles of teachers that are explicitly elaborated upon in competence profiles. The counseling of teachers in these competence profiles mirrors, as it were, the educational process. Personal aims are linked to the goals of the team or the school. Managers use the coaching leadership model.

Green stands for the recognition that teachers need to grow in their new role as study career counselors and that Schools need to grow in the new concept of competence-based education. Training courses have been organized for counseling teachers and professionalization plans have been drawn up. The Schools are supported by a staff division, for example by organizing seminars where experiences can be exchanged and by moderating a community of practices where the exchange of experiences and the creation of solutions are supported.

White stands for the developments taking place at any number of places. The staff divisions describe good practices, take part in innovative projects and launch hopeful new developments.

## **Portfolio Implementation at the Universiteit van Amsterdam**

The Universiteit van Amsterdam differs from INHOLLAND University as regards the collective concepts. The faculties are reasonably autonomous and formulate their educational concept themselves. The UvA is an academic university with 'traditional' education: lectures, work groups and laboratory courses.

Ever since 2001, there have been numerous pilots focused on working with an electronic portfolio. In the space of three years, the plans have been put into effect at nine of the twenty-four university departments [10]. Progress was so rapid all over that in January 2003, the decision was made at the central level to draw up a university-wide implementation plan [13]. The situation was described for a two-year out roll in an effort to have 40% of the 22,000 students working with an electronic portfolio by 2005. Due to the great financial investments this would involve, the decision was made to first discuss the matter with all the educational directors to enrol their commitment to the project. After their commitment was clear, a new Plan of Approach was written to prepare a Go - No Go decision for September 2004 [14], so the University Board could make a decision.

In the meantime, all the pilots are being counseled by the ICT in Education Department and the UvA has taken part in the DU Portfolio Implementation project.

When	What
2001-2003	Numerous pilots
Feb. 2003	Draft implementation plan for two-year out roll
Oct. 2003	Commitment from educational directors
Feb. 2004	Start of Go-No Go portfolio project with three tracks: pedagogy, management and technical issues
Dec. 2004	Go or No Go decision by the Board
Dec.-sept 2005	If it is Go: Tool implementation Design educational support for all the faculties Managers support route
Sept. 2005	All first-year students start with a portfolio?

Fig.10: Universiteit van Amsterdam Electronic Portfolio Implementation Route

The increasing focus on academic training and skills is the reason to start with a portfolio at this university without a central concept of competence-based education. Stimulating the growth of these skills and making them visible in a digital portfolio are the basis for all the pilots. Simultaneously with this movement, there is also renewed interest in arriving at a collective concept of education. As a result of the collaboration with a professional university (Hogeschool van Amsterdam), the improvement of the study career counseling is once again on the agenda.

These three movements converge in the UvA portfolio implementation route. Scenario 1 (instrument for counseling and personal development) is expected to serve as the guideline in the next few years.

In view of the strongly autonomous role of the faculties at the UvA, up to now the change approach (according to the classification by de Caluwé) has been characterized as a “yellow change” with attention for creating a support base / sharing views / involving the context. The implementation of an electronic portfolio will however require a “blue” approach with a blueprint for a study career-counseling route with checklists for the managers to steer the pilots and new initiatives. This is an approach that is common practice in the IT world but not so much at this university. There will also have to be a “red” focus on stimulating and encouraging teachers to grow in their changing role from expert to coach via a professionalization route.

Amsterdam-Rotterdam, October 14, 2004

## Footers and References

1. The ALT-SURF Spring Conference and Research Seminar: Living & Learning: e-Portfolios and Digital Repositories was held on April 22 - 23 2004. ALT (Association for Learning Technology) is the leading UK body bringing together practitioners, researchers, and policy-makers in learning technology. SURF is the higher education and research partnership organization for network services and information and communications technology (ICT). The aim of the meeting was to combine the knowledge and experience of the two countries and create the basis for cooperation in the future. As a result of this expert meeting, a briefing paper appeared in the autumn of 2004. Marij Veugelers, Simon Cotterill, Jonathan Darby, Peter Rees Jones, George Roberts, Jan van Tartwijk (2004). *E-Portfolios in the Netherlands and the UK*, ALT-SURF e-portfolio expert meeting April 2004; <http://www.surf.nl/en/publicaties/index2.php?oid=30>

2. E-folios (electronic portfolios) are popular in the higher education sector, but are difficult to use. This project provides guidance based on experience exploiting their potential and avoiding the pitfalls. Particular attention is devoted to life-long learning, monitoring and counseling the development of competences and skills throughout the curriculum, the assessment of competences and skills, ICT for e-folios and the implementation of educational innovation. There is collaboration between the Universiteit Maastricht, the University of Professional Education Utrecht and Utrecht University.
3. The Digital University is a consortium of ten universities in the Netherlands. It focuses on the development and application of digital educational products and knowledge in higher education. The participating universities are the Universiteit van Amsterdam, INHOLLAND University, Free University Amsterdam, Saxion University, the University of Twente, the University of Professional Education Amsterdam and the University of Professional Education Utrecht.
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12. Kemps, Alex (2003) *ePortfolio at INHOLLAND University*, In E-Portfolio 2003, abstracts and presentations.
13. Veugelers, Marij, Universiteit van Amsterdam, Department IT and Education (2003) *Projectvoorstel Implementatie Digitaal Portfolio UvA*, (Project proposal Implementation Electronic Portfolio UvA)
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