The Competency Portfolio
as a
Learning Management Tool

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Executive Summary:

How do you use a competency portfolio as a learning management tool? What does it mean to utilize an online portfolio? Does online portfolio mean ePortfolio?   How is this portfolio delivered or developed? Is onsite direct assistance required to create an ePortfolio? Is the portfolio a combination of hard copy documents and e-documentation or fully digitalized? Is there one method that is better then another?

Competency portfolio is a continuum, which ranges from a general narrative to a very specific checklist. In November 2009, a group of key stakeholders from across Canada came together to discuss the concept of the competency portfolio as a learning management tool.   The purpose of this paper is to share the knowledge brought forth in this session, to learn about current opportunities, identify key ingredients, and to discuss considerations and possible solutions in the development and use of competency portfolio.

Nine individuals presented on the status of their work in competency portfolio across the country.

Following these presentations, participant groups were asked to consider four aspects of competency portfolios:
- Facilitation
- Methodology
- Technology
- Terminology / Language / Culture

The discussion groups answered the following questions for each of the four aspects:
1. What is _____ in the context of a competency portfolio?
2. What were the related issues or factors that must be taken into account?
3. What are the mandatory and optional elements?
4. Who are the players / stakeholders?

The results of day were summarized into nine key points:
1. Reflection and self-awareness is critical to the portfolio process.
2. Portfolio development is both a self-directed and a facilitated process. Face-to face facilitation currently appears to offer the most benefit to participants and future research will determine how computer assistance can best contribute in supporting users.

3. Terminology in competency portfolio programs must be user friendly, culturally sensitive, and workplace relevant.
4. Flexibility is required in methodology and presentation in order to provide the user with the opportunity to create an exact as possible a representation of their competencies.
5. In developing the portfolio the needs of both the user (creator / owner) and the end user (potential employer / institution/ accrediting body / regulatory body) must be addressed.
6. Privacy, Trust, Ownership, Security must be built into the portfolio process.
7. Technology should support the process rather than drive it.
8. Even a "checklist" style of portfolio process should provide users with the potential to continue their exploration.
9. There are a variety of approaches to competency portfolios that produce successful results.

Preamble:

In preparation for this session a number of conference calls were conducted among the presenters. During these calls the presenters discussed their activities and what aspects of competency portfolios and learning management they demonstrated.

Through these discussions the idea of competency portfolios as a continuum developed as presenters engaged with understandings and approaches that differed from their own. Likewise the discussion led to the selection of the four aspects that formed the basis of the group discussions.

While there were logistical discussions during the calls it was the sharing of experiences and ideas that made up the majority of the presenters' conversations and led to the format and content of the CAPLA session.

Presentations:

ESPORT
Patrick Cummins

ESPORT, or Essential Skills Portfolio, is a computer based basic skills assessment and planning tool to help people prepare for entry-level occupations. ESPORT has four main components:
1. Exploring Self
2. Developing Skills
3. Exploring the Work World
4. Preparing for Employment

These components include a self assessment which incorporates the HRSDC Essential Skills, an interest inventory that is CWPI filtered, a gap analysis that

compares the client's actual skills to required skills for an identified job, and a resume generator that builds a resume based on skills that the client has self identified. ESPORT offers 200+ learning paths with each path covering 7 of the 9 essential skills. It is designed to develop transferable essential skills.

Though a computer based program, ESPORT is also a facilitated process.   As a computer based program, ESPORT is accessible 24/7 anywhere, anyplace and is flexible and self paced. Working with a facilitator provides additional assistance and direction to clients as well as a person who can assist the client in thinking about and identifying their skills and skill levels.

www.esportfolio.com

The Process of Transition
Bill Pigram

Reflection allows individuals in transition the opportunity to organize where they came from and where they are going. It allows people to shift their competencies into something more visceral, something they can own. Through the process of reflection individuals discover what is important in their lives. The result may be a values shift and a change of direction for the individual. Portfolio then becomes a means for the individual both to articulate credit and to share their journey. Therefore reflection allows people to move ahead with a clearer sense of purpose and goal.

Five myths about transition are:
1. Change needs to happen quickly.
   a. Time is required for reflection. In order for reflection to truly occur, the individual has to be afforded the time he or she requires.
   b. In allowing this time consideration must be given to how people will live (income).
2. Education is always a first choice.
   a. People do have competencies they can use during transition. These competencies may or may not lead to education.
   b. Education is not a bad choice, it is a good choice when applied in an appropriate way
3. Transition is a straightforward orderly process.
4. Individuals are self-aware.
   a. We tend to live in a linear fashion.
   b. Individuals often need to learn how to be self-aware.
5. You can solve most problems yourself.
   a. Technology itself is neutral but we are social by nature
   b. There has to be some sort of human contact .

Portfolio in the Digital World
Samantha Slade

The digital world is an extension of how we function in the physical world. It enhances and enables what we do. Therefore, it is normal that we turn to digital spaces and tools to help value, capture and communicate formal, non-formal, informal learning/competence development and recognition. ePortfolio is a part of this process.

There are a variety of approaches to online competency management. They are initiated and developed by; government, universities, private companies, and public organizations. Some are specific to processes of recognizing prior learning while others are more generally related to supporting management of one's skills/competencies. Samples of ePortfolio include:

www.careerwales.com
 www.competentieatlas.nl/
www.efoliominnesota.com
www.europortfolio.org
www.innovatice.com/Home/prestations/vae-a-distance/projets

Portfolio is unique in that it is owned by the individual. In a typical learning environment the teacher gives you the book but that book is owned by the course. At the end of the course you return the book. In a Portfolio program you are given a book to develop. At the end of the course not only is the book yours to keep but you continue to develop it.

For individuals engaged in the portfolio process, thinking in terms of what you are competent at is very different than thinking in terms of diplomas, certification and training. Suddenly, it doesn't matter so much where or how a skill was developed, what is important is that you are indeed competent and that you see it, can express it and if need be demonstrate it or provide some proof of that competence to others.

When ePortfolio is utilized the student becomes part of a community. The student can have access to tools, information, and forms that already exist within this community. At the same time s/he can develop what does not exist, whether it is personal (employment history), reflective ('what is my deepest learning.'), narrative (someone discusses your competencies), documentary (documents proving competencies) or media. Therefore ePortfolio can be a process that results in a more exact representation of the individual. True success occurs when the individual wants to share their portfolio with friends and family first and then with potential employers.

Socrates
Frank Vandenburg
Debra Blower

Socrates is an online system designed to address the identified needs of individuals who could benefit from PLAR but who were not comfortable with a PLAR process. In Socrates, users self-assess against competencies and outcome frameworks. Users list evidence of learning and relate them to relevant competencies. The key component is learning outcomes. Socrates includes synonyms (e.g. cars – automobiles), Blooms taxonomy, and transferability (the ability to carry information from one area to another without having to re enter it). Actions by the user are linked to their advisor permitting the advisor to view and assist with the user's work.

The individual using Socrates is provided with the opportunity to learn about RPL (Recognition of Prior Learning) in a convenient, less threatening fashion. Similar to 'online quote' systems, the user can see and experience the process before it becomes official. Once committed to the program, Socrates gives the user control over the initial part of their advising stage as well as control over the information entered and who had access to this information. Socrates encourages learners to explore their learning on their own and directs their thinking towards specific programs. The result is that users become more transparent in their expectations and are able to move towards the next steps in setting and/or achieving their goals.

For the advisor or institution, Socrates makes efficient use of staff resources and service delivery. It permits sharing of information and strategies in a time and cost efficient manner. Socrates also permits a uniform presentation of RPL from program to program within an institution.

www.nbcc.ca
www.rrc.mb.ca

Workplace Integration of Newcomers
Eddie Calisto-Tavares

This study was an initiative of the Manitoba Sector Training Network and was based on an identified need (demand and supply), coupled with direction and insight from employers and workers. The project developed and customized occupational profiles and assessment tools for Welders, CNC (computer numerical control) and millwrights (industrial mechanics). The project included seven components:
   1. Match supply and demand
        a. Needs identified by the workplace
        b. Identify supply of appropriately skills immigrants

2. Find employers and profile the occupation
    a. Technical competencies
    b. Language demands
    c. Organization/culture expectations
3. Found high skilled individuals with relevant skills sets
    a. Assessment
        i. Self assessment where appropriate
        ii. Subject matter expert
4. Identified technical skills gaps
5. Closed the gap training
    a. Most often small groups / one to one
6. Reassessed
    a. Competency check list checked off by instructor / trainer
    b. Completed by same person who had done initial assessment
    c. Periodically as gaps were closed
7. Documented competencies
    a. Completed by a subject matter expert
    b. Certificate with employer's logo and signed off by supervisor/trainer (i.e. a workplace credential) stating the person meets the company's requirements
    c. Certificates from Institutions as applicable

A total of fifteen individuals were included in the project. All participants received gap training on technical, language, and cultural and organizational norms. All fifteen completed Red Seal certification and are presently successfully employed.

www.options4success.com/pdf

Recognition for Skills and Learning
Gaelyne MacAuley

Recognition for Skills and Learning is a competency based assessment tool for journey persons and apprentices created by the Trades Essentials Centre in PEI. The objectives of the Professional Skills Record (PSR) project were:
1. To create a trade's assessment tool for the workplace that encompassed the whole scope of the trade.
2. Enable the transferability of recorded and verified skills and learning so the
    a. Journeyperson does not have to spend time and money re-teaching
    b. The apprentice does not have to spend time re-learning what they already know and can do
3. Build flexibility into the tool so that in addition to serving apprentices in the workplace, it can be used to track skills and develop learning plans for:
    a. Immigrants
    b. Learners in post-secondary programs
    c. High school students

Deliverables included:
- PSRs for 13 trades
- PSR user guide (contextualized for each trade)
- PSR Handbook for Journeypersons
- Generic Recognition for Skills and
- Learning Implementation Plan

The prototype was developed using the NOA (National Occupation Analysis). The tool, developed by apprentices and validated by industry, was built using competency based language that resulted in the apprentice knowing what they had to learn and the journeyperson knowing what learning they were verifying.   When an apprentice believed that s/he was competent in a required skills s/he would go to the journey person and asks to be signed off on that specific competency. All competencies build to one task though there could be ten to fifteen tasks related to a learning outcome.   Teams of journeypersons were created to monitor each apprentice. A total of sixty-seven participants worked with the tool over a two-year period. Additional information and progress on the development of the tool is available on the below listed website.

www.tradesessentials.ca

Continuing Care Assistance Program
Nancy Anningson

The Continuing Care Assistance Program was created in response to the shift from training for a particular practice to training for the entire continuing care sector in the province of Nova Scotia. This included addressing an industry skills shortage, an increase in the population requiring long-term care, and an increase in the age of workers in the field. The goal was to develop and implement a sector wide PLAR process to improve employment mobility of the workforce.

The objective of the project was to develop and implement a sector-wide PLAR process that:
- •Assessed and recognized the credentials of the current continuing care workforce;
- •Improved employment mobility of workforce through labour force access to CCA certification, and
- •Increased the number of qualified workers.

There are four ways to become certified as a Continuing Care Assistant (CCA) in Nova Scotia.
1. Traditional Study - a 2 year full time educational program.
2. PLAR- recognizing skills and learning to match them against required competencies.

3. Equivalency - NS provincially recognized courses; PCW, HSW, Home Health Aide .
4. Course recognition - learning paths created from course curriculum review.

The Continuing Care Assistance Program is formatted as an information session followed by a series of workshops (4 half day sessions, one to two weeks apart). The program trainer is a registered nurse with a minimum of five years experience in continuing care, knowledge of the CCA program, knowledge of adult learning principles, and an understanding of the PLAR concept. Outside of the group sessions, the individual completes his or her own evidence collection with assistance from 2 individual advising sessions. Exercises include:
 •Reflection papers
•Learning Narratives
•"A Day In the Life of a CCA" assignment
•Transcripts, verification letters, job descriptions, performance evaluations
•Work samples
•Demonstrations
•Verbal interview
•Competency Assessment Tool (CAT)

Content experts trained in PLAR assess evidence, once submitted.   Results are documented objectively and measured in relation to CCA learning outcomes. The level of modules granted varies for each person and applicants are entitled to appeal decisions related to the assessment.

www.placentre.ns.ca

Association of Canadian Community Colleges
Canadian Immigrant Integration Project
Maha Surani

Newcomers need to be prepared before they come to Canada. This project took place in China, India, and the Philippines and provided immigrants with two days of services to empower and enable them before they immigrated. It included:
- Labour market session
  - Job search, prospects, and readiness
  - Web and other resources and tools
  - Identification of key areas for further support
- Customized action plan
- Connection with Canadian Agencies
  - Focal point college and settlement agencies in every province

The program helped immigrants have the correct information in a timely fashion and empowered them to complete their research pre arrival so that they had connections upon arrival in Canada.   A competency based portfolio was not utilized

as it was considered too time consuming for counselors to implement overseas. However implications of an online competency tool that could be started pre immigration and completed post arrival in Canada was viewed to have possible potential as a means of assisting newcomers to identify and communicate their skills. This tool would have to be promoted and developed, as 'PLAR' is not universal worldwide. ACCC expressed an interest in this topic and requested to be informed of any research or projects in this area.

www.accc.ca

DISCUSSION GROUPS:

Following these presentations, participant groups were asked to consider four aspects of competency portfolios:
- Facilitation
- Methodology
- Technology
- Terminology / Language / Culture

The discussion groups answered the following questions for each of the four aspects:
1. What is _____ in the context of a competency portfolio?
2. What were the related issues or factors that must be taken into account?
3. What are the mandatory and optional elements?
4. Who are the players / stakeholders?

Results:
Topic ONE: FACILITATION

1. What is facilitation in the context of a competency portfolio?
    a. Guiding and advising
    b. Helping, teaching, mentoring
    c. Expertise
    d. To inspire and motivate
    e. To listen, provide support and leadership
    f. To guard authenticity so you can hear the learners' voice in the end product
2. What were the related issues or factors that must be taken into account?
    a. Language and literacy level of your participants
    b. Cultural sensitivity
    c. The expectation that the individuals have of the program and /or end result
    d. Delivery method (face to face / online / combination) and group size

e. The level of expertise of the group offering the program – program quality
    f. The ability to create safety and trust – the participants have to feel they will be treated with respect and have to feel safe in the process
    g. Available resources, ability to share information and resources
3. What are the mandatory and optional elements?
    a. Mandatory
        i. Sensitivity
        ii. Trust
        iii. Respect
        iv. Communication
        v. Stakeholder involvement
        vi. Flexibility
        vii. Quality
        viii. Accountability
        ix. Facilitator must be a content expert, patient, understanding, and be passionate and enthusiastic about the process
        x. Tools and resources available to participants
    b. Optional
        i. Time frame
        ii. Delivery format
        iii. Group size
        iv. Multi-lingual
4. Who are the players / stakeholders?
    a. Regulatory bodies
    b. Government
    c. Families
    d. Service providers
    e. Funders
    f. Employers
    g. Families
    h. Educators
    i. Community and community partners
    j. Special needs service providers
    k. And many more

Topic TWO: METHODOLOGY

1. What is methodology in the context of a competency portfolio?
    a. It is the approach, how we do it.
    b. It is how to successfully implement reflection.
    c. Needs to reflect the purpose for what it is intended for - both the user and the end receiver
        i. A client centered needs assessment that must meet the needs of all stakeholders

  ii. How long it takes

  iii. Owned by the individual

  iv. Facilitated by a group or by an individual

  v. Self directed process but the individual also receives direction and guidance

  vi. It is purpose and multi-purpose. Purpose – need to convince people 'what is in it for me' / multi-purpose – a variety of products that come out of the same process

2. What were the related issues or factors that must be taken into account?

 a. How to manage the narrative or whole person

  i. How critical is that and how do we manage it?

 b. Language and language abilities must be considered. The level used must be one that is clear and respectful (not 'dumbing' down)

 c. Acceptance of the end document must be taken into account. Benefit must be there for the intended end user as well as for the individual creating the document.

 d. Should be adult learner friendly (example ALFI CAN Study)

 e. Consider the time and level of commitment required. Is this something the individual wants and is able to do?

 f. What are the spin off benefits? If the individual is not able to complete the portfolio, what benefits still exist?

 g. Need to identify:

  i. Quality – how do we assure the portfolio has the quality needed for the portfolio process

  ii. What is critical in the portfolio process

  iii. What makes a good portfolio

  iv. That it meets national standards or a recognition body (when required)

  v. Security and confidentiality is built in to the process

3. What are the mandatory and optional benefits?

 a. Mandatory:

  i. Reflection

  ii. Clear meaning

  iii. Authenticity

  iv. Outcome professional and credible

  v. Confidentiality

  vi. Need to pilot before implementation

  vii. Establish the methodology in the school from early years on

  viii. Collaborative development and delivery

  ix. Engaging process – the process should be engaging, not daunting

 b. Optional

  i. Flexible order

  ii. Integrated remediation – though not required for everyone should be offered for those who required extra assistance in certain areas.

4. Who are the players / stakeholders?
    a. It is a collaborative process that includes learners, advisors, and guidance advisors
    b. Workplace
    c. Post secondary educators
    d. Government
    e. Industry
    f. Economic development councils
    g. Media
    h. Communicators
    i. Developers
    j. Process experts
    k. PLAR

Topic THREE: TECHNOLOGY

1. What is technology in the context of a competency portfolio?
    a. A vehicle or tool
    b. Increases mobility
    c. A means to an end
    d. Portal, real time
    e. Multi-media, audio
    f. Convenience
    g. Opening up
    h. Accessible and portable
    i. Question – would it limit the process or access?
2. What were the related issues or factors that must be taken into account?
    a. Accessibility and computer literacy
    b. Needs a system that grows over time, it is a living thing, maintenance
    c. Easy to put in information
    d. Limits – what is too much information from the assessor point of view
    e. Privacy, security, confidence. This should be in a policy.
    f. Where is the fine line on how customized you design it. One size fits all can be one size fits none but too specific and also be too much.
    g. User friendly
    h. Sense of community
    i. Interactive
    j. Ethics – in an online space there can be a blending of personal and professional
    k. Hosting of an issue – who and where it should be hosted
    l. "Lifelong" a lot of practical issues behind that term
3. What are the mandatory and optional elements
    a. Mandatory
        i. It has to be user friendly
        ii. Designed for the individual, relevant for the person using it, me going to my personal space

      iii. Modular and flexible

      iv. Able to develop trust in the system and process (for example, when on line banking first came to be people were skeptical but now online banking is considered normal)

        1. Need to accept that there may be an initial negative public perception knowing that at one point it will become positive

      v. Needs to communicate and interface with other systems within an organization – avoid repetition – technology is supposed to make our lives easier.

      vi. Incorporate multi media, have a professional look

      vii. Security!

   b. Optional

      i. Multi media

      ii. Printing

      iii. Professional

4. Who are the players / stakeholders

   a. If you are going to design an ePortfolio process who should be around the table?

      i. End user

      ii. Human Resource experts

      iii. Representatives from professional associations

      iv. Service providers

      v. Industry providers

      vi. Learning providers from all levels

      vii. Government (is this a help or a hindrance, if they have funds or access to funding they are a help)

      viii. Community representatives

      ix. Sector councils

      x. Cultural affairs experts

      xi. Regulatory bodies referring to regulated professions such as those in the health field (for example, midwifery uses and online portfolio)

      xii. Technology providers and experts

      xiii. Note: not every 'body' has to be represented on every project

Topic FOUR: TERMINOLOGY / LANGUAGE / CULTURE

1. What is the terminology, language, culture in the context of a competency portfolio

   a. It is not all encompassing

   b. Really want to be multi-lateral language – employers, stakeholders, and clients. Employers want plain language that is clear and relevant to the workplace. Incorporate the culture and language of the Canadian workplace.

     c. Let's define what 'PLAR' is before we talk and not assume everyone knows what it is.

     d. Incorporating individual interpretation of life experience and learning.

     e. Let's not allow communication and language to become the barrier

2. What were the related issues or factors that must be taken into account?

     a. Need to learn how to be self-directed. There is an assumption that everyone knows how to be self directed but culture plays a huge ability on a person's ability to do this. We may need to teach this or an individual may need to learn how to be self-directed. You can direct your own future.

     b. You need to have a human contact who actually knows what s/he is talking about and is sensitive and aware that there are cultural differences.

     c. Plain language, clear communication

     d. Ability to demonstrate or communicate your abilities

     e. Ability to self promote

     f. Need to be occupation specific

3. What are the mandatory and optional elements

     a. Pictures and videos

     b. Different ways to do a portfolio

     c. There is a need to be sensitive to the individual (culture, individuality) in terms of the design that you use. For instance, First Nations Technical Institute has a program (Igniting the Power Within) that incorporates tradition and culture.

     d. Need to have a larger aboriginal representation

     e. Learning styles need to be considered and addressed

4. Who are the players / stakeholders?

     a. Clients – Employers - Stakeholders

     b. Community as a whole

     c. Translators

     d. Collaboration is needed

     e. Industry, government, developers, regulators, licensing bodies, institutions, etc.

OBSERVATIONS / DISCUSSION:

1. Facilitation – What about having no actual face to face facilitation and just allowing the online tool to do the facilitation?

     a. Overwhelming impression that actual facilitation is better.

     b. If you are skyping is that face to face?

     c. Can there be a combination of face to face and tech / computer facilitation?

     d. Online tools can have guidance and facilitation built right in to them therefore decreasing the need for actual face-to-face facilitation. The

process itself assists the individual in gaining familiarity as they go through it so there may be opportunity for a combination of a facilitator at the beginning of the process and moving towards more independence with technological assistance later in the process. However the overall impression was that there was a benefit to having an actual facilitator.

2. Are there ever times when a learner wants some portion of their learning to be facilitator free? If so what or when it that?
   a. This can be a way to draw people in. You allow public access to a certain level or a test level of the process. People are able to access and assess the process on their own and make their own determination of how or if this 'fits' them. The result can be that it draws them in enough for them to want to proceed and they make the appointment.
   b. Anonymity provides people with the opportunity to learn the system and make mistakes without anyone knowing.
   c. Some will want to try it on their own. Others will want assistance from the get go.
3. Why wouldn't we offer the opportunity for someone to do a portfolio in the language they prefer and then translate it?
   a. There are a number of systems that do just that.
   b. This eliminates the language competency. Ultimately the individual will have to have a level of competency in English or French so if you prepare your portfolio in another language there is still the question of language competency. There is also the question of competency for the translator. Someone may have to translate the workplace competencies for the translator, as that person may not know workplace language.
   c. Someone could create a portfolio that represents his or her life and one section of that portfolio could be used for employment. The reflection section could be done in their mother tongue and the employment section in English or French.
   d. You already have to translate the documents that you bring over with you.
   e. Language is key but why should everything stop for that. An example: A Russian man started to talk and write in Russian and built his portfolio in Russian. Now five years later he is proficient in English. He recently got a job in Hong Kong based on his Russian skills and his Russian portfolio. Therefore if that is the first process you need (in your language of choice) in order to buy into the bigger process then why not. It is not that you are not learning English but that you are building a portfolio. Do not let a lack of English stop you from participating in this process.
   f. One of the practices in Toronto was that employers were looking for skills and not language. They could teach the language. They needed the skills.

g. PLAR and RPL is about communicating on a heart level. It is about helping someone look at him or herself. Doing that process in the language that you started with is important.

h. One of the first things you have to do in Canada is master one of the 2 official languages. Portfolio is looking at integration. At the beginning of the portfolio process why not introduce it in their own language and then switch to the language of their country of adoption later in the process.

SUMMARY CONCLUSIONS:

The following conclusions were summarized from the day's proceedings in regards to competency portfolio as a learning management tool:

1. Reflection and self-awareness;
   Reflection is an integral part of the portfolio process. Self-awareness is required in the process of reflection. You cannot assume that everyone is or is able to be self-aware. Cultural and life differences may result in an individual requiring assistance in the development of self-awareness that leads to reflection in the process of portfolio development.

2. Self-directed or Facilitated;
   Portfolio is a self-directed process. Despite this it was noted that facilitation in some format is required to assist the individual in the portfolio process. The format of the actual facilitation can vary from full face to face facilitation, group facilitation, technical or computer based facilitation, to a combination of the aforementioned styles. Additional research into the pros and cons of each method of facilitation, as well as best practices in facilitation, would need to be undertaken before one method of facilitation could be identified as the best or preferred method. However the overall impression was that some level of face-to-face facilitation was required in the process.

3. Terminology;
   Terminology when developing competency portfolio programs must be user friendly, culturally sensitive, and workplace relevant. It cannot be assumed that individual users or the employers that are utilizing portfolio for competency recognition are aware of or understand the concept and term "PLAR" or "RPL." Therefore the terminology must be reflective of the reality of the Canadian workplace.

4. Flexibility;
   Portfolio and/or ePortfolio require flexibility in methodology and presentation. This may include media, narrative, documentation, commentary, and/or other methods to prove competency. Flexibility provides the user with the opportunity to create as exact as possible a representation of their competencies.

5. User – End User:

In developing the portfolio the needs of both the user (creator / owner) and the end user (potential employer / institution/ accrediting body / regulatory body) must be addressed. Failure to consider both the use and end user may result in a gap between the competencies identified in the portfolio and those required by the end user.

6. Privacy, Trust, Ownership, Security;

Portfolio in the technical world provides unique opportunity for interaction between the creator (owner), the facilitator, and the end user (employer). However it also provides potential for exploitation of privacy. Therefore trust in the portfolio process, when utilizing ePortfolio or any technical means for portfolio development, must include trust in the technical system as well as trust in the individuals involved in the process (facilitators, instructors). Ownership of the portfolio must be clearly established as being in the hands of the user (creator / client) and not the institution or host agency / site.

7. Technology

The ways in which technology can support the portfolio process vary from providing digital storage for an ePortfolio to permitting a facilitator to appear "face to face" with a group hundreds (or thousands) of miles away. Regardless of the supporting role played by technology it must be remembered that it is a supporting role to increase the benefits to the participants rather than the focus of the exercise.

8. "Checklists"

The increase in outcome-based curricula, job descriptions and other frameworks means that competency checklists will play an increasing role in prior learning. It is important that even a checklist-focused process present the possibility of continued exploration to participants, even if that exploration would require them to seek additional facilitation.

9. Variety

It is important to realize that similar terms do not always mean similar approaches. The presenters spoke about very different processes that were all related to the concept of a "competency portfolio". It is important to clearly describe what the process contains to avoid confusion and/or disappointment on the part of participants.