September 22, 2014 Staples High School

WESTPORT BOARD OF EDUCATION

*AGENDA

(Agenda Subject to Modification in Accordance with Law)

PUBLIC SESSION/PLEDGE OF ALLEGIANCE:
7:30 p.m., Staples High School, Cafeteria B (Room 301)

ANNOUNCEMENTS FROM BOARD AND ADMINISTRATION

PUBLIC QUESTIONS/COMMENTS ON NON-AGENDA ITEMS (15 MINUTES)

MINUTES: September 8, 2014

DISCUSSIONS/PRESENTATIONS:

1.	National Executive Service Corps: Study to Improve School District Productivity and Efficiency	(Encl.)	**Deborah B. Brennan, Regional Director, NESC, Southwest CT**
2.	National School Climate Survey Results	(Encl.)	Mr. Rizzo Dr. Valerie Babich **Daisy Lopez, School Support, National School Climate Center**

DISCUSSION:

1.	2015-16 Budget Productivity/Efficiency Target: 0.25%	(Encl.)	Mr. Block
2.	Update: Use of Portfolio Assessments for 9th Grade Students	(Encl.)	Mr. D'Amico
3.	Report: 2014 Summer Maintenance Projects Completed	(Encl.)	Mr. Longo

DISCUSSION/ACTION:

1.	Policy P3400 and Regulation R3400: Capital Projects	(Encl.)	Dr. Landon Mr. Longo
2.	Approval: Health and Medical Insurance Revenues/Expenses	(Encl.)	Mr. Longo
3.	Adoption: 2015-16 Meeting Calendar of the Board of Education	(Encl.)	Dr. Landon
4.	Appropriation Returns to Town of Westport: FYE 2013 and FYE 2014	(Encl.)	Dr. Landon Mr. Longo

ADJOURNMENT

*A 2/3 vote is required to go to executive session, to add a topic to the agenda of a regular meeting, or to start a new topic after 10:30 p.m.
The meeting can also be viewed on cable TV on channel 78; AT&T channel 99 and by video stream @www.westport.k12.ct.us

PUBLIC PARTICIPATION WELCOME USING THE FOLLOWING GUIDELINES:

- Comment on non-agenda topics will occur during the first 15 minutes *except* when staff or guest presentations are scheduled.
- Board will not engage in dialogue on non-agenda items.
- Public may speak as agenda topics come up for discussion or information.
- Speakers on non-agenda items are limited to 2 minutes each, except by prior arrangement with chair.
- Speakers on agenda items are limited to 3 minutes each, except by prior arrangement with chair.
- Speakers must give name and use microphone.
- Responses to questions may be deferred if answers not immediately available.
- Public comment is normally not invited for topics listed for action after having been publicly discussed at one or more meetings.

WESTPORT PUBLIC SCHOOLS

ELLIOTT LANDON
Superintendent of Schools

110 MYRTLE AVENUE
WESTPORT, CONNECTICUT 06880
TELEPHONE: (203) 341-1010
FAX: (203) 341-1029

To: Members of the Board of Education

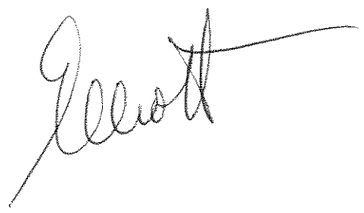
From: Elliott Landon

Subject: National Executive Service Corps (NESC) –
Improving School District Productivity and Efficiency

Date: September 22, 2014

Please find appended to this memorandum the "bios" of the NESC representatives who will be meeting with the members of the Board of Education in public session at our Board meeting scheduled for Monday, September 22.

Also to be found as an attachment is the Power Point presentation they will be using to introduce themselves to the Board prior to the discussion with the Board as to how the Board might want to use their services to increase productivity and efficiency within the Westport Public Schools.



National Executive Service Corps

Bios of NESC consultants
Westport Board of Education Meeting on 9/22/14

William Brautigam spent his for-profit career with three companies in the computer and computer services field -- Eastman Kodak, IBM United Kingdom, IBM US and Hewlett-Packard. He managed the turnaround of a full-service outsourcing contract that involved a Data Center, Network, Application Development/Maintenance and Desktop Support. He had responsibility for startup and delivery of the initial phase of a $120 million system development in the finance sector to create a six-year operational service for a global foreign exchange system. In the Telco sector, he developed and negotiated a transition strategy for a large outsourcing contract.

During his career, Bill has been involved in various projects' management. Currently, he is an independent consultant with Management Strategies, and has participated in and led multiple NESC engagements, including strategic planning, board development and operations analysis. Bill facilitates the Board Chair Roundtable that NESC co-sponsors with the Fairfield County Community Foundation's Center for Nonprofit Excellence.

Bill has a BA in Business Administration (Finance major) from Michigan State University.

Michael Karp has been consulting for local, regional, national and international companies for 35 years and is considered an expert in enhancing the performance of executives, organizational teams, boards and managers. He has published articles in leading trade journals on such subjects as succession planning, excellent performance, innovative marketing, and strategic planning. He is a Director in the Consulting Group of JH Cohn LLP; was Chairman of Don Aux Associates; and also worked for Peat, Marwick, Mitchell.

In the nonprofit arena, he is the Vice Chairman of the Northern Manhattan Improvement Corporation, a $20MM social services agency in Washington Heights, and is on the Board of the Bronx Charter School for the Arts and the Voice Charter School. Michael has led and participated in numerous NESC engagements, particularly with a focus on schools, organizational development, and change management.

Michael holds a B.S. in Chemistry from Penn State University and an M.B.A. from the Wharton School of Business.

2001 W. Main St., Suite 230, Stamford, CT 06902 Tel 212-269-1234 ext. 112 dbrennan@nesc.org www.nesc.org

John Scott retired from Pfizer in 2010, after a 33 year career which included technical and operational responsibilities in Manufacturing, Logistics and Product Development. During the last 7 years of his career, he led the global deployment of an Operational Excellence Strategy aimed at improving the performance of Pfizer's manufacturing and logistics operations. He currently has consulting assignments with several pharmaceutical companies.

Since joining NESC, John has contributed his process management and design expertise to multiple projects, and has most recently led one and participated in two schools' projects.

John holds B.Sc. and Ph.D. degrees in Chemical Engineering from Queen's University, Belfast, N. Ireland

Deborah Bowen Brennan spent more than 20 years at Citicorp in marketing and sales, new product development, and strategic planning in the consumer services group, information services, and private banking. She also spent two years as Chief of Staff to the Vice Chairman of Citicorp.

Since leaving corporate America, Debbie has been active in the nonprofit world in volunteer roles with the Darien Community Fund and the King Low Heywood Thomas School in Stamford. She was a Board member of the Harlem Partnership Project, serving in a strategic planning role, and served as Vice President at the George Washington Carver Foundation in Norwalk

Ms. Brennan is the Regional Director for NESC's Fairfield County practice. She graduated from Brown University and received her MBA from Carnegie-Mellon University.

2001 W. Main St., Suite 230, Stamford, CT 06902 Tel 212-269-1234 ext. 112 dbrennan@nesc.org www.nesc.org

National Executive Service Corps

Our services for:

Public School Leaders & Administrators

Westport Board of Education, 9/22/14

A wealth of experience.

www.nesc.org

Who we are

NESC is a nonprofit professional services firm whose consultants are volunteer senior business executives committed to enhancing the effectiveness of non-profit organizations.

We have completed over 2,000 projects for 1,200 nonprofit organizations in the tri-state region – with many satisfied clients returning for additional projects.

Our Mission

NESC Mission:

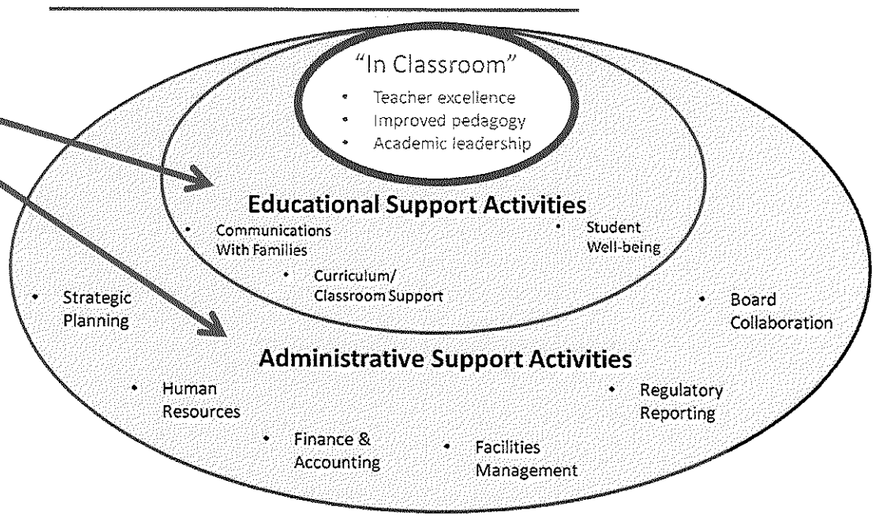
"To make a meaningful contribution to our communities by strengthening the management of America's nonprofit organizations, schools, and government agencies through high-quality affordable consulting services."

NESC Approach:

- **Experienced Consultants** – senior executives who volunteer and are committed
- **Project teams** – diversity of relevant for-profit skills and non-profit experience
- **Participatory, facilitated approach** – the client is engaged in the process and owns the solution
- **Actionable results** – timelines, accountability, and follow-up
- **Affordable rates** – a fraction of the cost of for-profit consulting firms

NESC Schools Offering

Our Focus Areas



Our Services

- Strategic planning
- Organizational assessment
- Process improvement
- Facilities planning
- Cost analyses
- Budget optimization
- Stakeholder communications
- Board development & governance

Our focus – answering tough questions

- Are our budget dollars being spent optimally to support the district's mission?
- Can our processes be designed more efficiently to free up resources?
- How can the district communicate more efficiently with parents, staff and faculty?
- Is our School Board working effectively as a team on shared goals and objectives?

Experience in Educational Consulting

Since 1985, we have completed over 85 consulting engagements with area schools – both public and private – and have forged long-term relationships with school districts and school superintendents.

Selected School Clients:

- Bedford Central School System
- Easton/Redding Public Schools
- Greenwich Public Schools
- New Canaan Public Schools
- REACH Prep
- Ridgefield Board of Education
- St. Catherine Academy
- Westport Public Schools
- Wilton Public Schools

Sampling of Projects:

- Strategic Planning
- Organizational Development
- Cost Analysis
- Support Services Analysis
- Operations Assessment
- Budgeting Process Review
- Special Ed Resource Utilization
- Board Assessment Facilitation

Our focus – answering tough questions

How can we help you?

DEPARTMENT OF PUPIL SERVICES
WESTPORT PUBLIC SCHOOLS
72 North Avenue
Westport, Connecticut 06880-2721

MICHAEL RIZZO
DIRECTOROF PUPIL SERVICES

(203) 341-1253
FAX (203) 341-1295

TO: Dr. Elliott Landon

FROM: Michael Rizzo and Dr. Valerie Babich

DATE: September 22, 2014

Comprehensive School Climate Inventory: District Results from April 2014

We are pleased to present to you tonight an overview of the district's results from the Comprehensive School Climate Inventory (CSCI) as part of the Westport Public Schools' ongoing commitment to school climate. Joining us to present this evening is Daisy Lopez, School Support Manager for the National School Climate Center.

The CSCI was first administered to all parents, school personnel, and students in grades three through twelve in October 2012. We readministered the same survey in April 2014 to all three groups. The 2014 results continue to be very positive and a reflection of our efforts across our school system to improve our school climate. The results highlight our many strengths in the area of school climate as well as the areas for continued improvement that we will address through our safe school climate committees in each school. School based climate committees and our district committee will analyze initial trends in our data as part of the process of improving school climate. The 2014 survey information will continue to guide our school teams, as they build upon the strong foundation they have developed and work toward further positive changes.

Attached to this memo is Ms. Lopez's presentation for your review. We look forward to a thorough discussion of this information within the context of our recently revised Safe School Climate Plan which highlights the culture of professional learning and trust necessary to sustain and make meaningful improvements in our school climate.

Finally, on behalf of the Westport Public Schools, we would like to publicly thank all those who took the necessary time to provide their feedback by completing the survey. Their efforts guide our work as a district team and as school-based teams.

Thank you for the opportunity to conduct this valuable work on behalf of the Westport Public Schools.

Westport Public Schools
CSCI Community Presentation

Daisy Lopez
Marketing & School Support Manager

National School Climate Center
formerly the Center for Social and Emotional Education (CSEE)

School Climate: What is it?

- School Climate refers to the **quality of school life as experienced by members of the school community: Students, School Personnel & Parents**
- It includes:
  - **Norms, goals and values** (e.g. mutual respect)
  - **Relationships, Teaching & Learning and Leadership practices**
  - & Organizational **structures and processes** – rules, regulations, and enforcement

Why is School Climate Important?

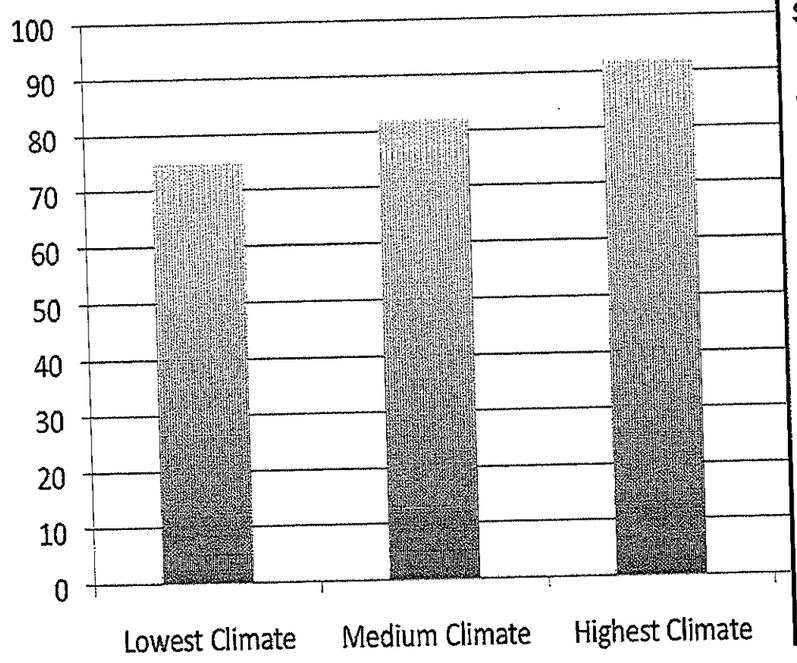
More than 30 years of research shows that a healthy school climate supports:

- Positive Youth Development
- Academic Achievement & Student Learning
- Effective Risk Prevention/Health Promotion
- Higher Graduation Rates
- Increased Teacher Retention

(For recent school climate research summaries, see Cohen, et. al. 2009; Cohen & Geier, 2010)

School Climate & Performance Index Score

(2006-07, Ohio Department of Education (2008) and the NSCC/CSEE)

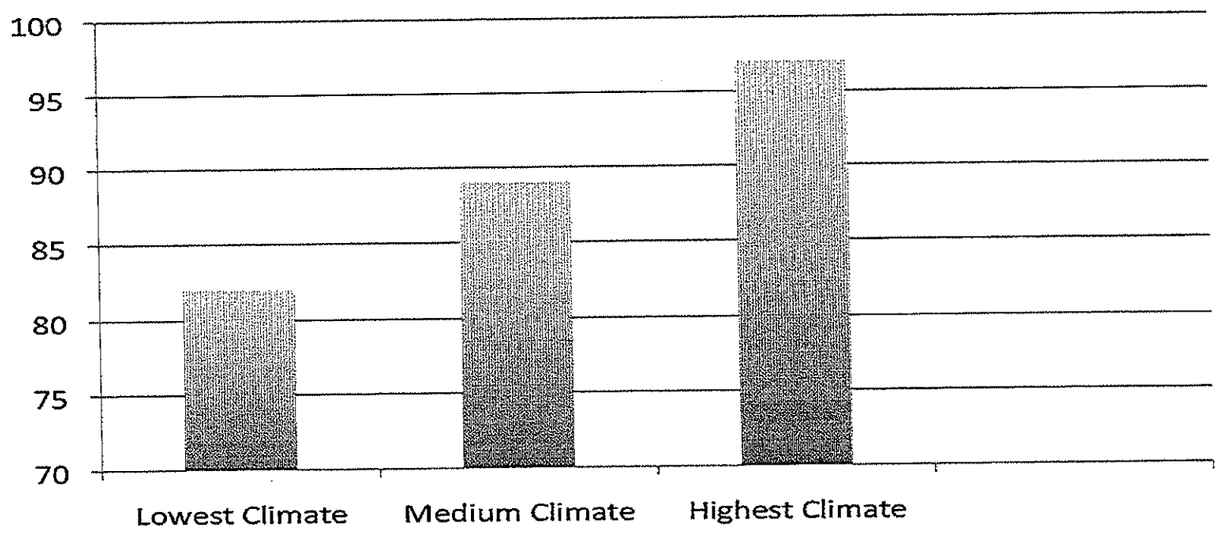


Our own research shows:

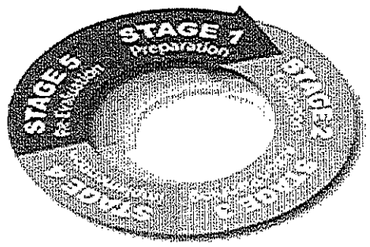
- Strong correlation btwn school climate and academics
- Holds for both low and high poverty schools
- Applies to MS and HS
- Even stronger for graduation rates . . .

School Climate & Graduation Rates

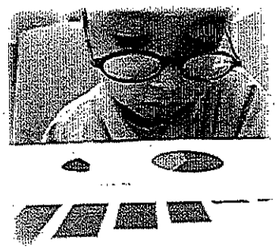
(2006-07, Ohio DOE (2008) and the NSCC/CSEE)



Assessment & Improvement Process



1. **Planning for Change**
   - Form a representative team/ establishing ground rules
   - Leadership Commitment/ Fostering "Buy in"
   - Establishing a "no fault" framework/ culture of trust
   - Community Engagement/Outreach
2. **School Climate Assessment/Evaluation**
   - **Measurement Process**
   - **Interpretation of Results**
3. **Action Planning**
   - **Drill down to key priorities**
   - **Research best practices/ evidence-based programs**
   - **Define action plans**
   - **Establish benchmarks and clear timelines**
4. **Program/Project Implementation**
5. **Re-assessment/Re-evaluation**



What is the CSCI?

- Developed in 2002, **The Comprehensive School Climate Inventory (CSCI)** measures how critical groups – **students, school personnel** and **parents/ guardians** – perceive the school's climate for learning.

- The CSCI was evaluated by three independent survey development experts in 2006 who **confirmed the tool was reliable and valid.**

- **Two recent studies confirm the CSCI's strength:**
  1) A 2010 study of 102 school climate surveys, found the CSCI to be one of only three measures to meet *American Psychological Association* criteria for reliability and validity. (Gangi).
  2) A 2011 study of 73 middle school measures, recommended ten as being reliable, valid and aligned with SEL research. Of those, the CSCI was the only school climate measure recommended. (*Social Development Research Group*).

Assessment and CSCI Report Benefits

- **Engages the community** by giving stakeholders a voice in a protected manner-anonymous and protected down to the reporting level
- **Gain school-wide perspectives** of key stakeholders: student, staff, and/or parents
  - Establishes a shared definition of school climate for discussion
  - Representation of variability between and across populations
  - Representation of data by sub-group (grade, gender, race, etc.)
- **Recognizes school strengths** to celebrate and leverage
- **Identifies school needs** to allocate resources and prioritize action steps
- **Establishes benchmarks** for improvement

CSCI:
Comprehensive School Climate Inventory

- **Safety**
  - Rules & Norms
  - Physical
  - Social-Emotional
- **Teaching & Learning**
  - Support for Learning
  - Social & Civic Learning
  - Professional Relationships (school personnel only)
  - Leadership (school personnel only)
- **Relationships**
  - Respect for Diversity
  - Social Support – Adults & Students
- **Environment**
  - Connectedness/ Engagement
  - Physical Surroundings

The 12 Dimensions of School Climate Measured

Dimensions	Major Indicators
Safety	
1 Rules and Norms	Clearly communicated rules about physical violence; clearly communicated rules about verbal abuse, harassment, and teasing; clear and consistent enforcement and norms for adult intervention.
2 Sense of Physical Security	Sense that students and adults feel safe from physical harm in the school.
3 Sense of Social-Emotional Security	Sense that students feel safe from verbal abuse, teasing, and exclusion.
Teaching and Learning	
4 Support for Learning	Use of supportive teaching practices, such as: encouragement and constructive feedback; varied opportunities to demonstrate knowledge and skills; support for risk-taking and independent thinking; atmosphere conducive to dialog and questioning; academic challenge; and individual attention.
5 Social and Civic Learning	Support for the development of social and civic knowledge, skills, and dispositions including: effective listening, conflict resolution, self-reflection and emotional regulation, empathy, personal responsibility, and ethical decision making.
Interpersonal Relationships	
6 Respect for Diversity	Mutual respect for individual differences (e.g. gender, race, culture, etc.) at all levels of the school—student-student; adult-student; adult-adult and overall norms for tolerance.
7 Social Support—Adults	Pattern of supportive and caring adult relationships for students, including high expectations for students' success, willingness to listen to students and to get to know them as individuals, and personal concern for students' problems.
8 Social Support—Students	Pattern of supportive peer relationships for students, including: friendships for socializing, for problems, for academic help, and for new students.
Institutional Environment	
9 School Connectedness/Engagement	Positive identification with the school and norms for broad participation in school life for students, staff, and families.
10 Physical Surroundings	Cleanliness, order, and appeal of facilities and adequate resources and materials.
Staff Only	
11 Leadership	Administration that creates and communicates a clear vision, and is accessible to and supportive of school staff and staff development.
12 Professional Relationships	Positive attitudes and relationships among school staff that support effectively working and learning together.

District Response Rates

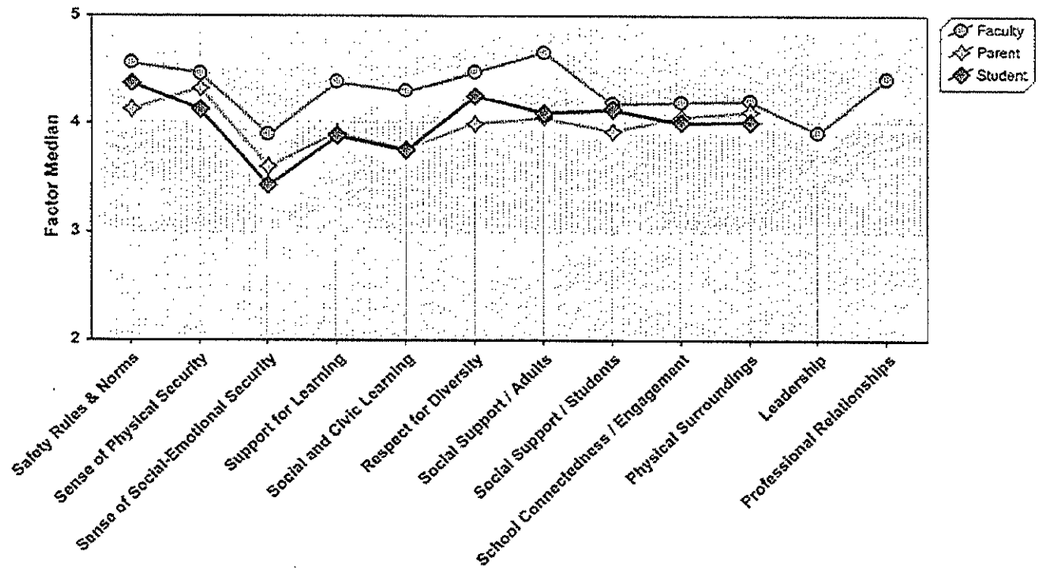
School	Student Response #/Total (%)	Staff Response #/Total (%)	Parent Response #/Total (%)
Bedford Middle School	779*/860 (90.58%)	96*/108 (88.89%)	180*/744 (24.19%)
Coleytown Elementary School	250*/263 (95.06%)	67*/78 (85.90%)	87*/328 (26.52%)
Coleytown Middle School	503*/535 (94.02%)	61*/89 (68.54%)	93*/468 (19.87%)
Greens Farms School	214*/230 (93.04%)	56*/87 (64.37%)	111*/305 (36.39%)
Kings Highway Elementary School	253*/266 (95.11%)	59*/89 (66.29%)	89*/347 (25.65%)
Long Lots Elementary School	300*/320 (93.75%)	69*/91 (75.82%)	195*/457 (42.67%)
Saugatuck Elementary School	255*/271 (94.10%)	63*/84 (75.00%)	72*/359 (20.06%)
Staples High School	1280*/1880 (68.09%)	176*/275 (64.00%)	338*/1509 (22.40%)

*Figures received from school to represent potential number of respondents.

- **Parent response rates above average for some schools**
- **Engagement levels may be impacted by:**
  - **timing of administration**
  - **family perception of current climate (positive)**
  - **family involvement in follow-up action planning and awareness meetings**

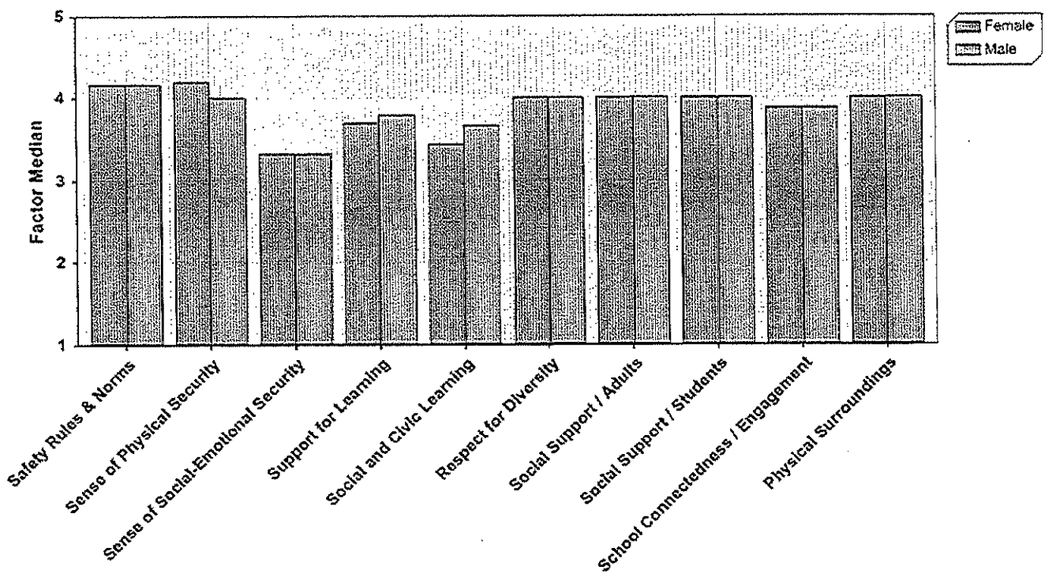
District Results By Population

Climate Scores by Population



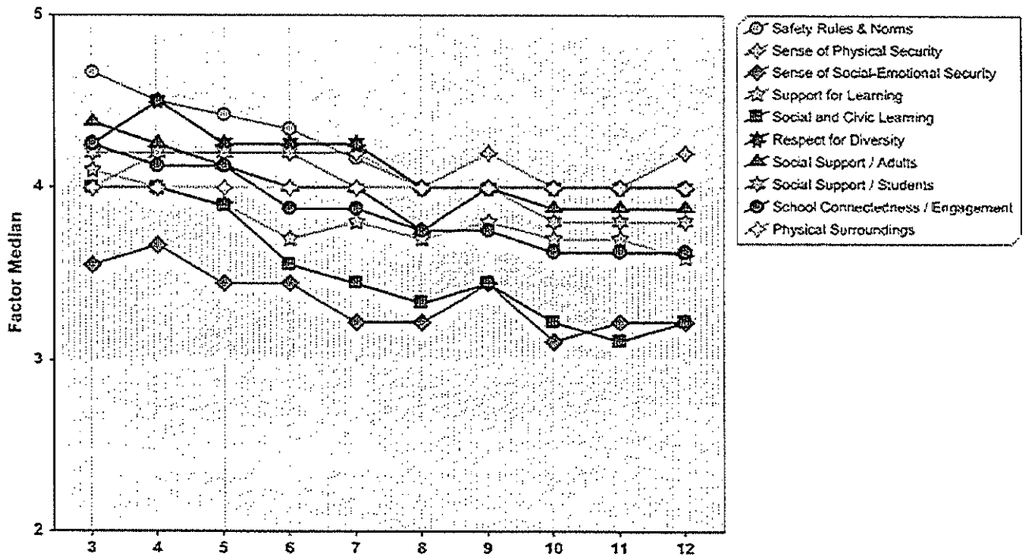
District Results
Students By Gender

Student Climate Scores by Gender



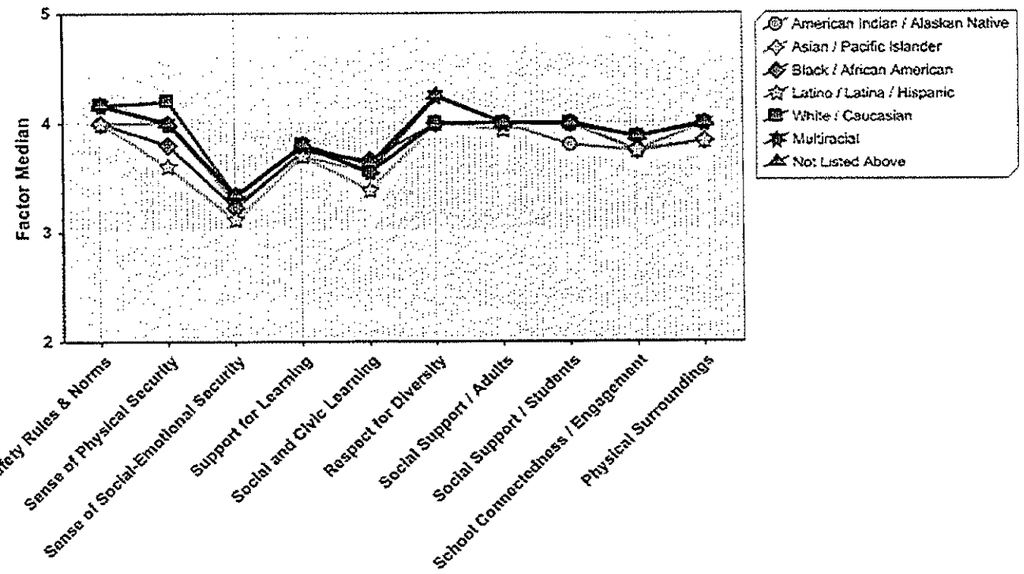
Student Climate Scores by Grade

Student Climate Scores by Grade



Student Scores By Race/Ethnicity

Student Climate Scores by Race/Ethnicity



Relative Rankings By Population

Relative Factor Rankings by Population

Dimensions	Students	Staff	Parents
Safety Rules & Norms	1	2	2
Sense of Physical Security	3	4	1
Sense of Social-Emotional Security	10	10	10
Support for Learning	8	5	8
Social and Civic Learning	9	6	9
Respect for Diversity	2	3	6
Social Support / Adults	5	1	5
Social Support / Students	3	9	7
School Connectedness / Engagement	7	8	4
Physical Surroundings	6	7	3

Note: If two or more dimensions have the same median score, they are given the same (higher) rank. For example, if two dimensions score a 4.0 and that is the highest score, they will both be ranked "1" and the next highest score will be ranked "3."

District-wide Strengths

- **Safety Rules and Norms**: consistently rated high across all populations
- **Social Support-Students**: 4.0+ student ratings with a majority of student scores showing an increase from 2012
- **Respect for Diversity**: consistent and positive scores for all three populations with some student scores experiencing an increase from 2012

District-wide Challenges

- **Social-Emotional Security** – though 11th grade student score has increased, 10th grade remains a challenge

- **Support for Learning** – score fluctuation from 5th-12th grades – what efforts are happening at higher scoring grades such as 5th, 7th and 9th grades to provide insight about variability?

- **Social and Civic Learning** – disconnect between staff and student scores (must consider the high range of staff scores for context→ extremely high staff scores reaching 4.60)

We Have Data...Next Steps?

- **Additional Training** and Supports needed
  - Training for district expertise & sustainability
- **Engage** the entire community in improvement evaluation and action planning- remember "Buy in" from Stage 1 of 5-Stage Improvement Model
- **Dig deeper** into results and look for **consistent trends across buildings to share findings and common strategies**
- **Revisit** initial school improvement plans and consider the successes and challenges of each effort/strategy
- **Build** on past efforts to integrate results with current efforts

We Have Data…Next Steps? (contd.)

District level

Committee will meet to review district wide results and trends

Elementary and Secondary Schools level

Administrators at each level will meet to share ideas, learn from each other

School-based level

Teams will review individual school data and share with school community

National School Climate Center
formerly the Center for Social and Emotional Education (CSEE)

NSCC

For More Info

Daisy Lopez
dlopez@schoolclimate.org
212-707-8799 x 12
www.schoolclimate.org

FREE NSCC RESOURCES

- ***BULLYBUST*** – a student-led awareness campaign to reduce bullying in our nation's schools. Sign the STAND UP pledge today at: www.bullybust.org.
- ***National School Climate Standards: Benchmarks to promote effective teaching, learning and comprehensive school improvement*** –(www.schoolclimate.org/climate/standards.php)
- ***NSCC Blog*** – stay updated on the latest news in the field (blog.schoolclimate.org).
- ***School Climate Guide for District Policy Makers and Educational Leaders – (***www.schoolclimate.org/climate/process.php)
- ***School Climate Matters*** – quarterly e-newsletter with key resources, expert articles, and educator tips (www.schoolclimate.org).

National School Climate Center
formerly the Center for Social and Emotional Education (CSEE)

NSCC

Relevant readings

Cohen, J, McCabe, E.M, Michelli, N.M & Pickeral, T. (2009). School Climate: Research, Policy, Teacher Education and Practice. *Teachers College Record,* Volume 111: Issue 1: pp. 180-213.

Cohen, J. & Geier, V. (2010). *School Climate Research Summary: January 2010* (available on: www.schoolclimate.org/climate/research.php)

Cohen, J., Pickeral, T., & Levine, P. (2010). The Foundation for Democracy: Social, emotional, ethical, cognitive skills and dispositions in K-12 schools. *Inter-American Journal of Education for Democracy*, Vol. 3. No. 1, pg. 74-97 (http://scholarworks.iu.edu/journals/index.php/ried/)

Gangi,T.A. (2010). *School climate and faculty relations: Choosing an effective assessment tool* (http://gradworks.umi.com/33/88/3388261.html

Haggerty, K., Elgin, J., & Woolley (2011). *Social-emotional learning and school climate assessment measures for middle school youth.* Social Development Research Group, University of Washington and the Raikes Foundation

National School Climate Council (2007). *The School Climate Challenge: Narrowing the gap between school climate research and school climate policy, practice guidelines and teacher education policy.* On www.schoolclimate.org/climate/policy.php

The 12 Dimensions of School Climate Measured by the CSCI

Dimensions	Major Indicators
Safety	
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WESTPORT PUBLIC SCHOOLS

ELLIOTT LANDON
Superintendent of Schools

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WESTPORT, CONNECTICUT 06880
TELEPHONE: (203) 341-1010
FAX: (203) 341-1029

To: Members of the Board of Education

From: Elliott Landon

Subject: 2015-16 Budget Productivity/Efficiency Target: 0.25%

Date: September 22, 2015

After much discussion, the Board unanimously agreed to include in our **GOALS FYE 2015** the language which follows:

> **Identify a target of 0.25% productivity and efficiency *within our current budget* for the next 3 years based on $109 Million.**

Based on our current budget of $109,552,011 we would need to identify the sum of approximately $275,000 *in current expenditures* for the productivity and efficiency gains desired. However, with four (4) months of the current fiscal year ended and additional time needed for the Board to decide how and where to implement the necessary budget reductions, we could not impose those reductions until the completion of six months of the current fiscal year. The net effect would be to require reductions of $550,000 in last six months to accommodate a $275,000 reduction within a full fiscal year.

Therefore, it is my recommendation that the Board of Education neither introduce nor require a 0.25% productivity and efficiency budget reduction within this 2014-15 school year.

As we look to the future, if we were to have budgetary increases of 3.5% for the next three years, or 4.5% as I have predicted in the development of a five year operating budget forecast that was presented to the Board on September 8, we would need to make productivity and efficiency budget reductions, or engage in total cost avoidance of $1,772, 533 over the next three years with an anticipated 3.5% budget increase in each of those years or, in the alternative, $1,813,115 with a 4.5% anticipated budget increase in each of the next three years.

Elio Longo has a single spreadsheet outlining the progress of the above in the accompanying document entitled, "0.25% Target Efficiency Cost Avoidance Analysis: FY15 through FY 18."

Paul Block has provided us with a template as to how we might approach these projected increases in productivity and efficiency and I have attached his Power Point analysis to this memorandum.

This item appears as our first discussion item at our meeting scheduled for Monday, September 22.

0.25% Target Efficiency Cost Avoidance Analysis
FY15 through FY18

Annual inflator: +3.5%

	July 1	target efficiency	budget increase	July 1 (w/o eff.)	recurring savings	%
FY15 (Year 0)	$ 109,202,984			$ 109,202,984		
		$ (273,007)				
			$ 3,812,549			
FY16 (Year 1)	$ 112,742,526			$ 113,025,088	$ (282,563)	-0.26%
		$ (281,856)				
			$ 3,936,123			
FY17 (Year 2)	$ 116,396,793			$ 116,980,967	$ (584,174)	-0.53%
		$ (290,992)				
			$ 4,063,703			
FY18 (Year 3)	$ 120,169,504			$ 121,075,300	$ (905,796)	-0.83%
	$ 458,511,806	$ (845,856)		$ 460,284,339	$ (1,772,533)	-1.62%

Total Cost Avoidance: **$ (1,772,533)**
Effective Compounded Rate: ***-1.62%***

Annual inflator: +4.5%

	July 1	target efficiency	budget increase	July 1 (w/o eff.)	recurring savings	%
FY15 (Year 0)	$ 109,202,984			$ 109,202,984		
		$ (273,007)				
			$ 4,901,849			
FY16 (Year 1)	$ 113,831,825			$ 114,117,118	$ (285,293)	-0.26%
		$ (284,580)				
			$ 5,109,626			
FY17 (Year 2)	$ 118,656,872			$ 119,252,389	$ (595,517)	-0.55%
		$ (296,642)				
			$ 5,326,210			
FY18 (Year 3)	$ 123,686,440			$ 124,618,746	$ (932,306)	-0.85%
	$ 465,378,122	$ (854,229)		$ 467,191,237	$ (1,813,115)	-1.66%

Total Cost Avoidance: **$ (1,813,115)**
Effective Compounded Rate: ***-1.66%***

WPS Financial Performance Objectives
Driving Proficiency with Productivity and Efficiency
Through Benchmarking and Best Practice

Board Of Education Meeting

Monday, September 22, 2014

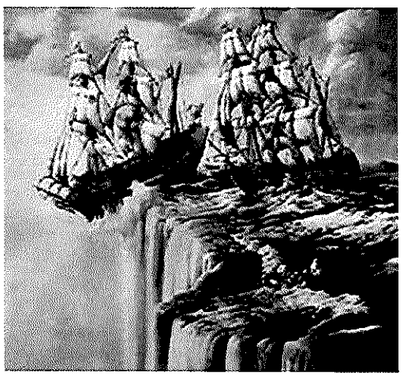
The most dangerous phrase in the language is " we've always done it this way"

Rear Admiral Grace Hopper

The first rule of creative thinking and creative problem solving …

- "Forget what we know" because we don't really ***know*** anything. We only ***think*** you know. What we ***think*** is determined by what you ***believe***. What we ***believe*** is determined by how we ***feel***.
- If we want to be more creative, we need to become more aware of what we think we know and put it aside – to allow ourselves to be more creative.

Source: George Torok, creativity catalyst



WESTPORT 2025 Vision

21st Century Capacities in Teaching and Learning

Board of Education should Embrace and Lead our Vision

- *Critical Thinking* *(analyze, synthesize, evaluate)*
- *Creative Thinking* *(ideas, possibility, change)*
- *Communication* *(thought leadership, inspire action, work collaboratively)*
- *Global Thinking* *(synthesize perspectives, create original ideas & innovation)*

CONTEXT

Challenge and Opportunity for WPS

Challenge

- *To accelerate our academic, cultural, athletic and social agenda*
- *With an annual fiscal budget rate increase of a "real" 3%*

Opportunity

- *Increase proficiency 100% in growth rate, achieve "value" of 6%.*
- *Be more strategic in our planning, setting longer range horizons*
- *Be more proficient in our operations to increase value*
- *Be the cutting edge leader in both education and education management*

CUTTING EDGE POSSIBILITY

Through collaboration and proficiency

Collaboration

- *Utilize all human and economic resources at our disposal to improve the operational proficiency of WPS – our town, our community, our students*

Proficiency

- *Build methodology to gather data and develop a robust situation analysis*
- *Set performance objectives (quantitative targets) in productivity and efficiency*
- *Develop strategy (how) to achieve our performance objectives*
- *Drive both productivity and efficiency initiatives*

OPERATIONAL PROFICEINCY

Doing More with Less

PRODUCTIVITY

- Quantity
- *Doing more* with the same
- More output
- Produce more

Example: teach 6,000 students For $109,200k vs 5,700 = 5.3% productivity

EFFECIENCY

- Quality
- Doing the same *with less*
- Less resources
- Reduce cost

Example: we teach 5,700 students for $105,200 vs $109,200 = 3.7% efficiency

USING BENCHMARKING

To Achieve Operational Proficiency

The Objectives of Benchmarking:

- to find examples of superior performance
- to understand the processes and practices driving that performance
- to improve performance by tailoring and incorporating best practices
- to innovate, not imitate

The Results of Benchmarking:

- *Improved performance* various methods
- *Understanding relative cost position* comparative cost analysis
- *Increasing the rate of organizational learning* new ideas
- *Validating the current model* comparative model analysis

Source: Bain Capital

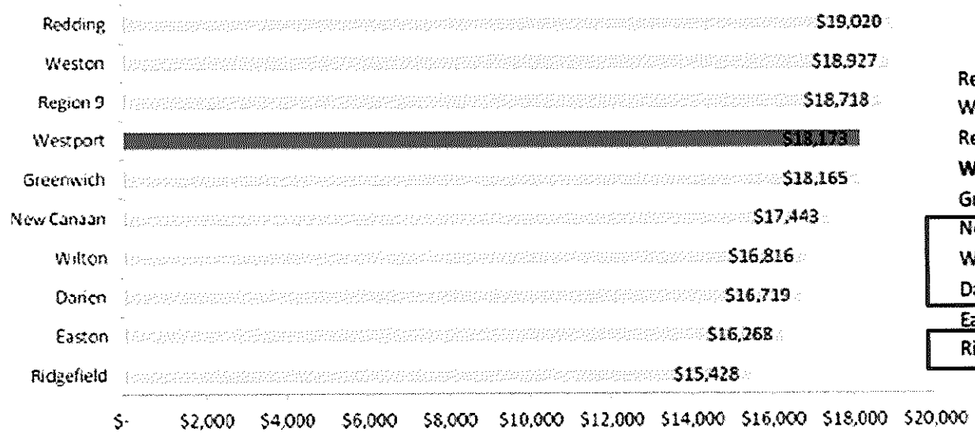
COST PER STUDENT

WPS Efficiency of $1,000 CPS is 5.5% = $5.7 million

source: Connecticut Department of Education November 2013

- New Canaan, Wilton, Darien and Ridgefield have comparable ADM at 4,220, 4,296, 4,874 and 5,287 respectively compared to Westport at 5,762 yet they are at $17.4k, $16.5k, $16.2k and $15.2 vs WPS at $18.2

- $1,000 CPS to $3,000 CPS lower delta vs relatively similar size districts



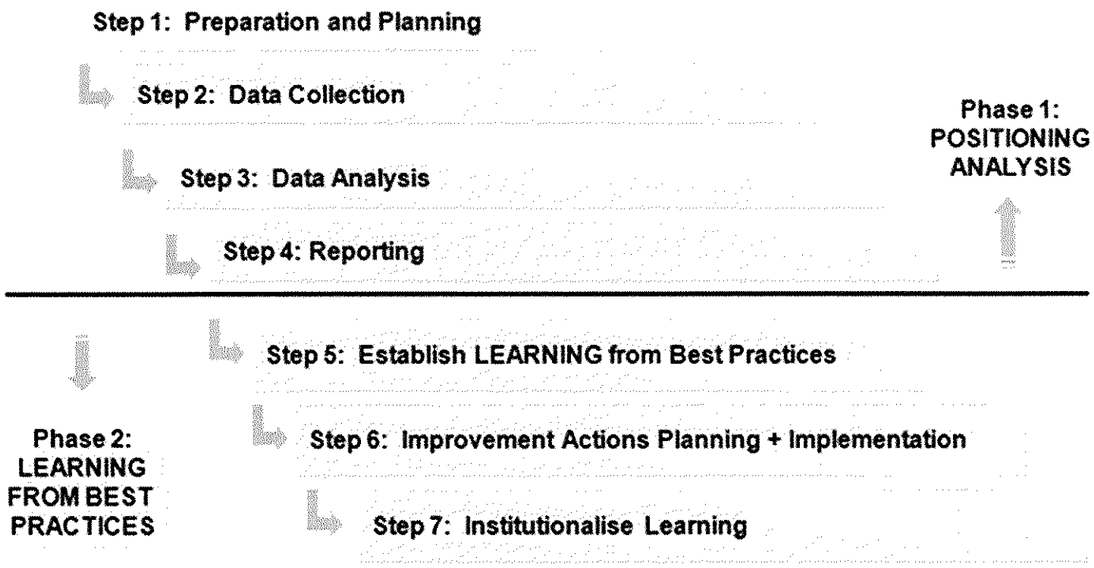
	2011-2012	2012-2013	Increase
Redding	$ 17,980	$ 19,020	5.8%
Weston	$ 18,141	$ 18,927	4.3%
Region 9	$ 18,433	$ 18,718	1.5%
Westport	**$ 17,636**	**$ 18,173**	**3.0%**
Greenwich	$ 17,917	$ 18,165	1.4%
New Canaan	$ 17,115	$ 17,443	1.9%
Wilton	$ 16,550	$ 16,816	1.6%
Darien	$ 16,185	$ 16,719	3.3%
Easton	$ 15,738	$ 16,268	3.4%
Ridgefield	$ 14,519	$ 15,428	6.3%

PROPOSED ACTIONS

1. Adopt a 3 year long range plan (LRP) process
2. Establish strategic performance objectives in the LRP
3. Set an objective of 50% to 100% proficiency of fiscal budget increase
4. FYE 2016 increase at 2.5% = $2.7 million. Target proficiency of $1.35 to $2.7
5. Hire a graduate student, either part time as a student, or a graduate thesis
6. Budget $12,000 ($3k per quarter) for the project and cost of the student
7. Use this process and strategic objective as a real 2025 example for WPS
8. Establish Quarterly reviews for the FYE 2016 budget & long range plan (LRP)

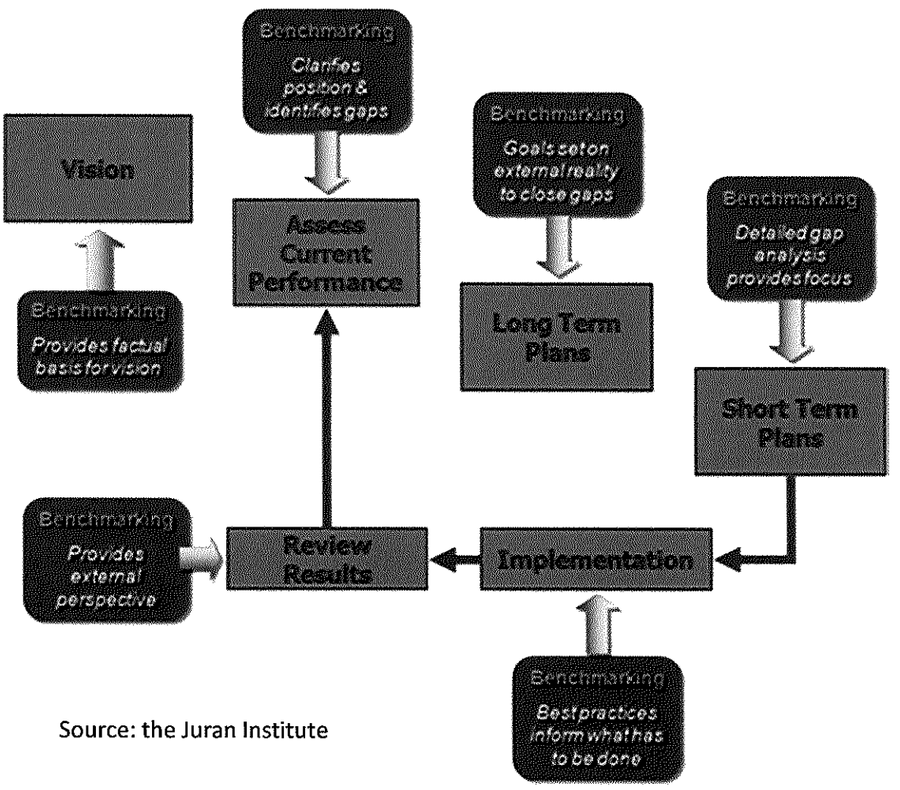
appendix

What Does a Benchmark Process Look Like?



Source: the Juran Institute

Benchmarking and Performance – Long Range Planning (LRP)



Source: the Juran Institute

Seven Steps to Benchmarking?

- **Step 1: Preparation and planning.** Determine the methodology and set a clear action plan.
- **Step 2: Data collection.** What to measure and how to measure it. Establish metrics.
- **Step 3: Data analysis.** Data normalization to enable like comparisons.
- **Step 4: Reporting.** Analysis reported in a clear, concise, and easily understood format.
- **Step 5: Learning from best practices.** Evaluate best in class and why.
- **Step 6: Planning and implementing improvement actions.** Develop action plan for change that will be needed to realize improvements. Learning points feed into the strategic plan and should be implemented via the performance improvement processes.
- **Step 7: Institutionalizing learning.** The insights gained and the performance improvements achieved must be fully embedded within the organization. All levels must be linked via a cascading series of goals to ensure systematic progress toward the vision.

Source: the Juran Institute

James D'Amico
Director of Secondary Education

TO: Elliott Landon
FROM: James D'Amico
SUBJECT: 9th Grade Portfolio Pilot
DATE: September 22, 2014

This past spring, a group of teachers and administrators met to discuss the broad implementation of portfolio assessments at Staples High School. Portfolio assessments have been used for many years at Staples in individual classes, such as the former 10th Grade English/Social Studies Collaborative course, and last year by a handful of English teachers in their classrooms. We have also, on a limited basis, developed portfolio projects at the middle school level. The value and importance of portfolios as a means of assessing student learning is outlined in the district's May, 2014 Westport 2025 Vision for Assessment:

> Students will maintain an online portfolio, grades 4-12 charting their progress in all subject areas. Students will organize their portfolios around the four 21st century domains: critical thinking, creative thinking, communication, global citizenship. They will produce written reflections identifying their areas of strength and need for growth as well as how their work products cross over disciplinary lines and show their development of 21st century skills. The online portfolio will include text as well as video and may be used in the college admissions process. The Westport School System will adopt appropriate software to facilitate the creation and maintenance of these portfolios.

In addition to begin meeting the goals of the district vision as stated above, we also envisioned a portfolio creation process that would help teachers get a clearer picture of how students see the Westport 2025 Lens, providing us with valuable information to measure our success in communicating our learning expectations to students. In order for students to do this, the group felt that it was critical to bring an interdisciplinary approach in some way to the portfolio creation process.

With this criteria in mind, we outlined the following sequence of events for 2014-15:

- All students in Grade 9 will receive an introductory lesson on how to create a portfolio as part of their two-day Library Learning Commons orientation
- The lesson on portfolio creation will take place during each student's social studies class

- Portfolio creation orientation goals will include helping students see how portfolios can be useful in school, as well as in future educational and career endeavors
- Students would be provided with a template allowing them to categorize their work and reflections in line with the four domains of the Westport 2025 Lens
- All teachers of 9th grade students will meet before school starts to increase awareness of the portfolios so they can encourage students to submit works from multiple disciplines
- All teachers of 9th grade English courses will require periodic submissions to the portfolio as a part of their course assessments
- A minimum of two pieces of work from both English and Social Studies classes will be required during students' 9th grade year
- Follow-up meetings with teachers of 9th grade students will be scheduled to share examples of student work, and foster submissions from other subject areas outside of the humanities
- Teachers will collaboratively examine student work and reflections, as well as gather anecdotal information about students' experiences in creating the portfolios
- We will plan during the 2014-15 year for subsequent use of the portfolios during this cohort's future classes

The Information-Technology Literacy (ITL) department staff has worked over the past several years with teachers who have used portfolio assessments. Over the years we have looked at portfolio-specific products like Richer Picture and Digication, products that have built-in portfolio features such as Adobe, Naviance and BlackBoard, and website creation tools like Weebly.

The ITL staff was charged this past summer to find optimal software to support the creation of student portfolios on a larger scale. We decided to utilize Google Sites software for the process as opposed to other dedicated software packages. Reasons included:

- Cost: Google Sites is included in our district use of Google Apps for Education software
- Security: The Google Sites used for this project require Westport Public Schools login and password information, and should any issues arise, can be addressed by our technology support staff. Embedding the portfolio sites in Google Apps also facilitates easy sharing within the school community, so that students can securely share their portfolios with fellow students and teachers
- Capacity: We want students to submit video, audio, and other multimedia files in addition to text, and Google has no file size restrictions
- Flexibility and Creativity: The Google Sites templates students use are blank slates, allowing them to customize their portfolios to reflect their personal styles
- Transferability: We can transfer ownership the portfolio at no cost to students upon graduation so that they can use their work as they pursue future educational and career opportunities.

These portfolios are also critical as we approach the deadline to implement a Senior Demonstration or Capstone project for the Class of 2020, in accordance with Connecticut General Statutes (§ 10-221a (2012)). The development of a portfolio drawing on a student's growth throughout their high school career serves the interests of our broader learning goals and the objectives of this state requirement. As we work to develop a plan for the Capstone experience at Staples High School, we will use the information gathered from these portfolios to guide our thinking.

I had the opportunity to observe a ninth grade social studies class during their orientation to building a portfolio. Students were directed to use the Student Lens to think about their work, and encouraged to think across disciplines. The LLC teachers were helpful, and fielded student questions about the mechanics of creating links and inserting media, layout and organization options, and ideas about types of work to submit. The teachers were also able to promote an exciting source of support for students after their orientation, the new student-run technology help desk in the Staples LLC.

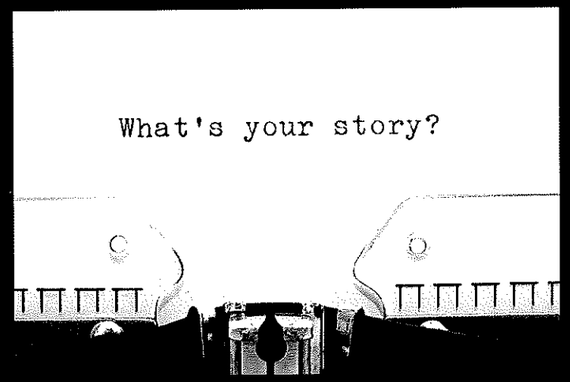
For your review, I have provided the following documents to provide more in-depth context for our work:

- Presentation slides and instructions given to Grade 9 students as a part of their orientation to the portfolio
- An excerpt from a 2010 dissertation on digital portfolios and learning, specifically a portion of the Review of Literature that addresses digital media and learning, self-directed learning, learning with understanding, constructivism, reflection and meta-cognition, participatory learning, and development of social capital
- A scholarly article addressing benefits and challenges of implementing electronic portfolios through social media,
- A short paper that, while focused on higher education, provides helpful questions and structures for creating learning portfolios.

This initiative is off to a good start, and I look forward to reporting on our progress in the spring, when we will have samples of student work available, and more defined plans for how the portfolios will be used in the future.

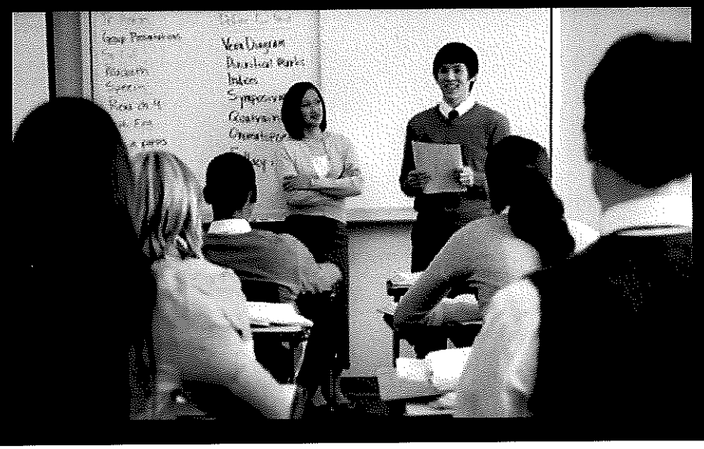
ePORTFOLIOS

ePortfolios

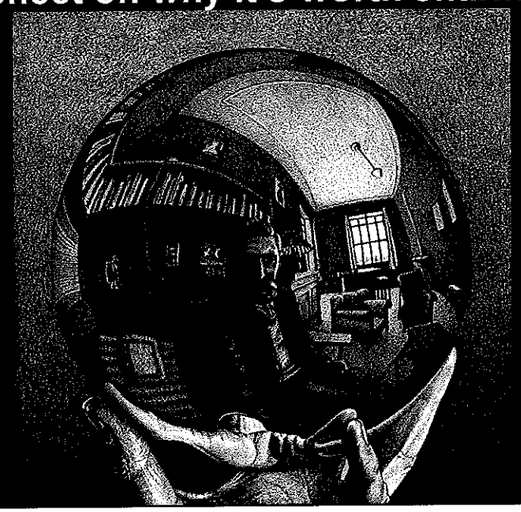


ePortfolio:
power tool to tell your story

Allows you to share your work. . .



. . .reflect on why it's worth sharing. . .



. . . and consider what it says about who you are.

Freshman Google Sites template

ePortfolio Template

About Me | Student Resources | Critical Thinking | Creative Thinking | Communication | Global Thinking | Civic & Social | Su

About Me

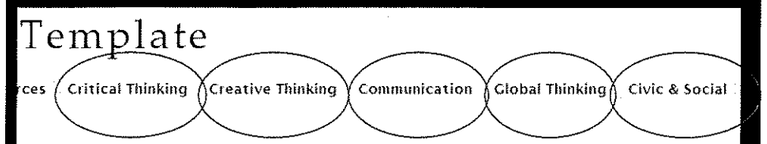
At a minimum this homepage should include...

- *Your full name*
- *Graduation year*
- *SHS email address*
- *A picture (optional)*

...but feel free to decorate it as you like. Just make sure the information above is clearly visible!

Recent Site Activity | Report Abuse | Print Page | Remove Access | Powered By Google Sites

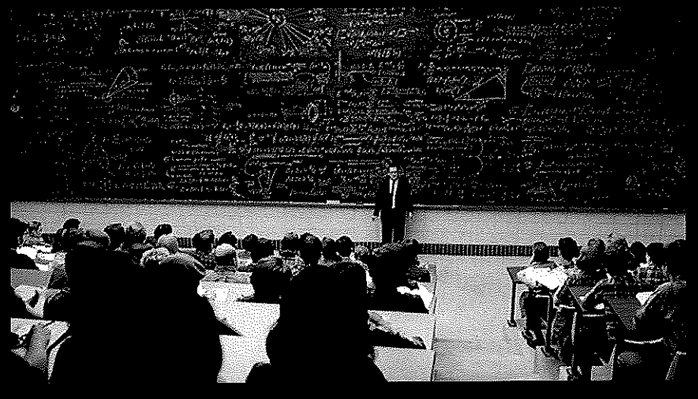
Organized by the 2025 Student Lens



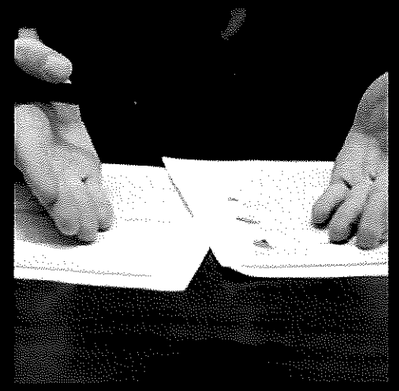
It could be a great paper. . .

. . . a great dance. . .

. . . or a B on a project in a class Mom warned you about.



You decide what you want to include. . .



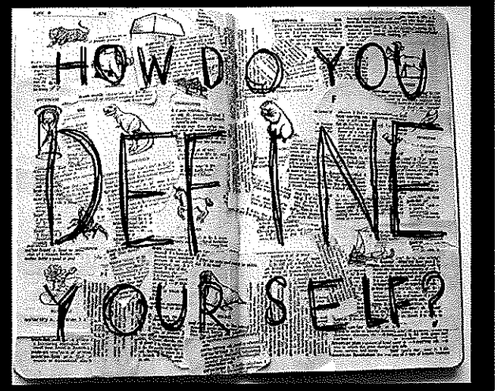
. . . and explain why this work is relevant to your story.

- What did you do?
- Why is this worth sharing?

Reviewed by adviser. . .

Bragging tool

Defining tool



I am >

DIRECTIONS FOR ADDING NEW WORK

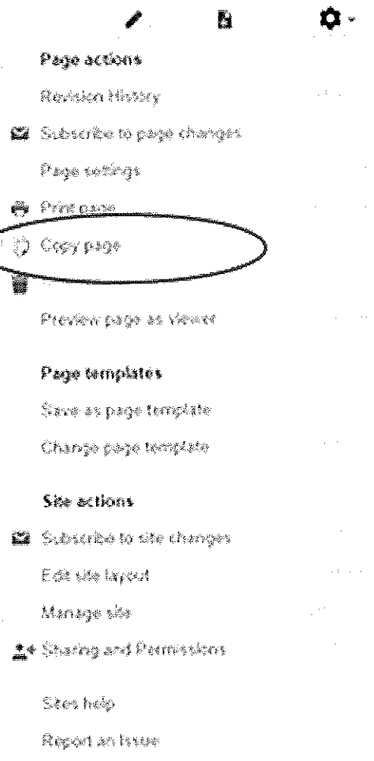
TO YOUR ePORTFOLIO

Directions for Adding New Work to Your ePortfolio

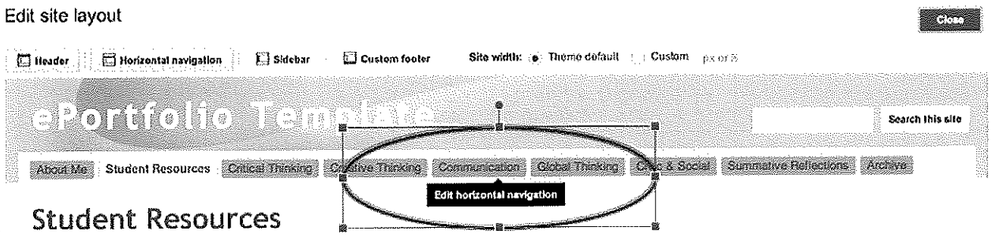
The purpose of this ePortfolio is to provide a digital location where you can store evidence of your learning here at Staples High School. You will use this ePortfolio in classes to catalog work that reflects your growth as a learner and ultimately to present your accomplishments to teachers, employers and colleges.

Procedure for Adding New Work:

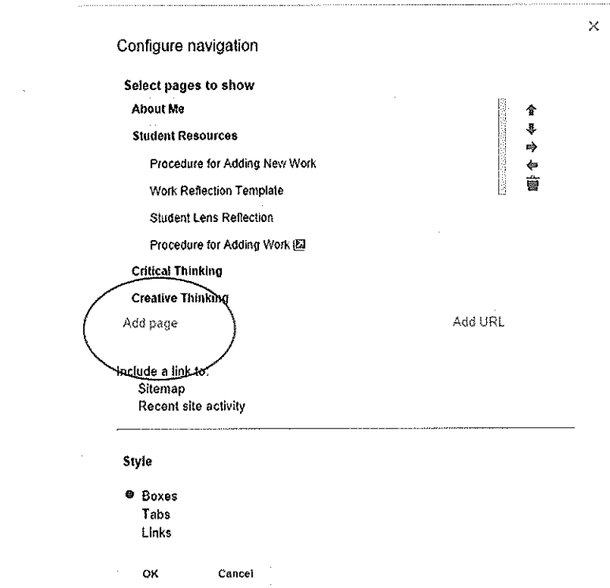
- Access the **Work Reflection Template** from the *Student Resources* drop down menu.
- Click on the gear icon  to access the drop down menu and select **Copy page.**



- Name your new page after your work and press COPY.
- Replace the *italicized* text with your thoughtful reflection.
  - Note: you will have to enter the domain of the 2025 Student Lens in the last reflection question.
- Save your page by clicking the Save button in the upper right hand corner of the screen.
- Go back to the gear icon and select the fifth option from the bottom, **edit site layout.**
- Mouse over the the navigation buttons near the top of the page until you see Edit horizontal navigation and click.

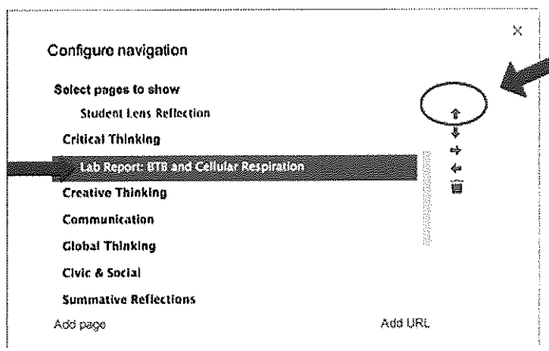


- In the pop up menu click **Add Page.**



- A second pop up menu will open with the list of pages on your site. Scroll down and select your work page and click **OK.**
  - This will add your site to the navigation menu.

- Use the up arrow button to the right to move your work page under the correct domain. The work pages and the domain should NOT line up; it should be indented under the domain you have chosen.



use up arrow to move your work to the proper domain.

Your work should be indented under the one of the domains on the 2025 Student Lens. Note it will not be **bold.**

- Click **OK** to save your work. Your work should now appear as a part of the domain drop down menu. In this case, when I mouse over the Critical Thinking domain, the first item in the drop down menu will be "Lab Report: BTB and Cellular Respiration"

To Upload Your Work:

- At the bottom of the screen, you can either paste a link to your work or click **Add files** to upload files from your computer or Y-drive. If you paste a link, please make it active by highlighting it and clicking the chain icon on the menu bar at the top.
  - Note: If you link to work and then **delete** this doc from your Google Drive, it will no longer show up as work in your ePortfolio!

- **DO NOT DELETE ANYTHING FROM YOUR EPORTFOLIO!** If you feel that a submitted piece of work is no longer relevant, move it into your archive.

DIGITAL MEDIA AND LEARNING: A YOUTH FOCUS

Excerpt From:
Digital portfolios and learning: The Students' Voices
Donnelly, Brian Francis.
University of California, Davis, ProQuest, UMI Dissertations Publishing, 2010. pp. 24-45

Abstract:

The convergence of innovations in digital technologies and expanding global internet connectivity has given rise to an emerging field of study identified as Digital Media and Learning (DML). (Davidson and Goldberg, 2009; Gee, 2009; Ito, Horst and Bittanti, 2008; Jenkins and Purushotma, 2008). In describing his work for the MacArthur Foundation's Digital Median and Learning Initiative, Gee (2009) argues the field of digital media and learning is in its infancy. Gee contests there is an urgent need for scholars, with interest in various aspects of digital media, to develop studies that contribute to a body of knowledge about how digital technology may enhance learning and, potentially, transform society. This study was developed to make such a contribution.

Although the literature on digital portfolios places great emphasis on the portfolio as a tool to support student learning, few studies include students' voices and offer thick descriptions of their experiences related to creating and using digital portfolios, nor how those experiences may enhance learning. In response to this deficit, this qualitative case study gives voice to 27 high school seniors and 7 senior class teachers from a Southern California high school that has created a technology rich culture, where, for the past ten years, all students in grades 9-12, and all teachers are required to create and maintain an internet based digital portfolio.

This investigation illuminates the potential of digital portfolios to support learning by highlighting the successes and shortcomings of the institution's current digital portfolio practices as directly expressed by students and teachers. The study offers further insight into possible connections between digital portfolios and learning by giving voice to insights offered by students and faculty regarding possible new learning strategies enhanced and enabled through emerging types of digital media applications such as social networking sites, blogging and text messaging.

Digital Media and Learning: A Youth Focus

While the literature on E-portfolios is highly skewed towards a focus on higher education and older students, the current literature emerging from the MacArthur Foundation's Digital Media and Learning initiative, offers a more balanced discussion related to digital portfolios in the K-16 continuum. Several of the initiative's studies focus exclusively on youth including elementary, middle, and high school age students. Some of this research explores the interplay between young people's informal interactions with digital media and their learning (Davidson and Goldberg, 2009; Gee, 2009; Ito, Horst, and Bittanti, 2008; Jenkins and Purushotma, 2008; Kahne, Middaugh, and Evans, 2009).

In reporting the findings from a three year study entitled "Living and Learning

with New Media: Digital Youth Project" (Ito et al., 2008) the authors argue that youth's engagement with new digital technologies facilitate unprecedented opportunities for creativity, personal interaction, and social activism; moreover, it sets the stage for a radical re-thinking of *how* and *where* learning occurs.

> In both friendship-driven and interest-driven online activity, youth create and navigate new forms of expression and rules for social behavior. By exploring new interests, tinkering, and "messing around" with new forms of media, they acquire various forms of technical and media literacy. Through trial and error, youth add new media skills to their repertoire, such as how to create a video or game, or customize their MySpace page. Teens then share their creations and receive feedback from others online. By its immediacy and breadth of information, the digital world lowers barriers to self-directed learning (p. 9).

Ito et al. (2008) point to a critical barrier to transformational change in education. In their lives outside the confines of the school environment, young students are immersed in a wide range of digital interactions. When they enter the world of school, students often find themselves in an environment that largely discourages, if not prohibits, the use of the same digital technologies that engage them as learners outside of school. Contributors to the Digital Media and Learning (DMAL) initiative argue that the challenge in front of us is to find ways to help educators overcome their fear that digital media in school will undermine their position of authority and control. Ito et al. (2008) offer the following insight:

> Contrary to adult perceptions, while hanging out online, youth are picking up basic social and technological skills they need to fully participate in contemporary society. Erecting barriers to participation deprives teens of access to these forms of learning. Participation in the digital age means more than being able to access "serious" online information and culture. Youth could benefit from educators being more open to forms of experimentation (p. 13).

Their study does not advocate letting students rampantly engage in texting friends or immersing themselves in social networking sites while in school. Rather, it does encourage collaborations between educators and students as a means for constructing the integration of digital media into the curriculum. The proposition is not to eradicate traditional practices, but to discover opportunities to enhance and expand them.

Davidson and Goldberg (2009) explore the notion of students taking control of their learning through engagement in digital technologies and the concomitant need for institutions to be open to "forms of experimentation." The authors highlight a critical distinction between instructional technology -- IT,(Instructional Technology) where learners have limited freedom with respect to how they learn, and digital media that encourages a self-directed and participatory approach to learning.

> Instructional technology is usually a toolkit application that is predetermined and even institutionalized with little, if any, user discretion, choice, or leverage. IT tends to be top-down, designer determined, administratively

driven, commercially fashioned. In participatory learning, outcomes are typically customizable by the participants (p. 13).

This critique is not an indictment of instructional technology, simply recognition of its limitations. There are many instances when a highly structured, predictable instructional technology system that supports student learning and assessment is invaluable. A participatory approach to learning, as presented by the authors, necessitates a willingness on the part of institutional leaders to offer students greater freedom and flexibility on how to leverage digital technology to promote new ways of learning. The authors write, "Our argument here is that our institutions of learning have changed far more slowly than the modes of inventive, collaborative, participatory learning offered by the Internet and an array of contemporary mobile technologies (p.14).

The dominant tone of the majority of references to digital portfolios can be viewed as ambitious optimism. Jafari and Kaufmann (2006) assert: "the E-Portfolio is currently effecting a quiet revolution in the world of learning" (p.ix). Stefani et al., (2007) note that, after completing their book, "We have emerged with our confidence in E-portfolios renewed. They *do* offer a very different approach to supporting teaching and learning…" (p.7).

Gee (2009) also shares an enthusiasm for the potential of digital media to support new ways of learning, but urges caution. Gee emphasizes that much more work has to be done to make sure that the potential of digital media in learning is fully realized. He states, "There is a vibrant yet nascent area of research and intervention sitting at the intersection of digital media and learning" (p.14). His work for the MacArthur Digital Media and Learning initiative, to be published in book format in 2010, presents a call for

concerted research from multiple disciplines in order for a field of study in Digital Media and Learning to mature. In Gee's words:

> The emerging area of digital media and learning is not just the study of how digital tools can enhance learning. It is, rather, the study of how digital tools and new forms of convergent media, production, and participation, as well as powerful forms of social organization and complexity in popular culture, can teach us how to enhance learning in and out of school and how to transform society and the global world as well (p. 14).

The literature on digital portfolios and the insights gained from work on digital media and learning--such as Gee's remarks--illuminate two critical and interrelated challenges that must be addressed concurrently. First, is the need for studies on applications of digital media that incorporate current and emerging knowledge about learning from multiple disciplines. Second, is the continuation of work regarding the technological infrastructure, policies and protocols for implementation and use of digital portfolio systems that address local, regional, national and international needs. The first of these two challenges is directly linked to this study.

The literature suggests that three areas offer the potential for enhancing learning in and out of school and empowering students to become actively engaged citizens. First, the digital portfolio could serve as a tool to allow the locus of control for learning to be in the hands of the learner. Second, the digital portfolio, by providing a dynamic archive of student generated content, could facilitate a meta-cognitive approach to learning through reflection. Third, the digital technologies that help create and connect digital portfolios (DP's) to the broader world could support a

high level of *participatory learning.*

Digitally enabled and enhanced interactions might encourage learners to articulate to others the meaning they have constructed around their learning experiences, thereby forging a better understanding of "what" and "how" they have learned. (Davidson and Goldberg, 2009; Gee, 2009; Ito et al. , 2008; Jenkins, 2008; Kahne et al., 2009).

Self-directed Learning: Shifting the Locus of Control.

Success in what has been referred to as the 21st century "knowledge economy" will be determined on more than what a person knows; it will hinge on an individual's capacity to determine what they need to know and how to wade through enormous amounts of content to determine what is valid and relevant to a particular problem or situation (Siemens 2005; Hartnell and Young, 2009). As Hartnell-Young (2009) notes, it is important to make a distinction between knowledge and learning. The author cites Dewey (1910), who regarded knowledge as "a product constructed by people and containing the meaning of objects and events. Learning, in this sense, then, is the process by which knowledge is created. Knowledge itself is in the form of objects (including principles and theories) to be considered, criticized, and improved by the learners"(p.5). Learning, as presented here, occurs in the mind. It is an act of constructing meaning, as a student encounters the world. How a student represents that meaning can be seen as knowledge construction. The work of Bransford, Brown and Cocking (2000) stresses that traditional, sometimes passive approaches to learning, are inadequate for the demands of a 21st century knowledge economy. Their work does not diminish the importance of teachers or experts, who can provide instruction and

guidance. However, the authors conclude that success in the knowledge economy will be greatly enhanced by a student's ability to assume a far greater role in the development of his/her own learning by becoming more independent and self-directed.

Learning with Understanding.

The self-directed process of learning that Bransford, Brown and Cocking (2000) suggest encompasses more than the independent acquisition of factual knowledge; it requires what they refer to as *learning with understanding* (p.8). They argue that many educational curricula have placed too much emphasis on the memorization of facts; in addition, the assessments of learning rely too heavily on tests that evaluate a student's ability to recall factual information. The authors stress that the acquisition of factual knowledge is important. However, students must be supported in developing their abilities to organize factual knowledge around important concepts in order to apply or transfer the knowledge to think about, and solve problems in new or unexpected contexts.

The authors echo the distinction that Hartnell and Young make between knowledge and learning. Learning in its deepest sense occurs when students build upon their prior knowledge, from past experiences (social and academic) and the knowledge they access though authoritative sources such as texts, teachers, mentors. Subsequently, they construct their own meanings through reflection aimed at discerning how factual knowledge and information fit into broader conceptual models or mental schema that they have. (Bransford et al., 2000).

Gardner (2004) examines the notion of understanding by contrasting what he refers to as *subject matter* understanding and *disciplinary* understanding. Like

Bransford et al., (2000), he argues that schools place far too much emphasis on the acquisition of factual knowledge or what he terms *subject matter understanding*:

> All over the world students study different subjects--mathematics, history, biology, physics, perhaps music, psychology or geography. They read texts, listen to lectures, and carry out exercises. Often, however, what they learn is primarily information of a factual sort. After the course, they appear to know what they did not know before--the formulas for the binomial theorem, the dates of civil war battles, the names of phyla and orders, or the laws of thermodynamics" (Gardner, 2004, p. 12).

Gardner asserts that *subject matter understanding*, as described above, can be too easily lost and forgotten because it is not connected to larger conceptual frameworks. In contrast to subject matter understanding, he defines *disciplinary understanding* as "a distinctive way of thinking about the world and a distinctive way of analyzing" (p. 9). He suggests that a major goal of education should be to support students in developing the abilities and confidence to think like historians, scientists, and mathematicians. Approaching learning in this way encourages what Gardner terms "performances of disciplinary (or genuine) understanding." He writes, "Such performances occur when students are able to take information and skills they have learned in school and other settings and apply them flexibly and appropriately in a new or at least somewhat unanticipated situation" (Gardner, 2004, p. 10).

Constructivism.

A self directed form of learning is central to the Constructivist theory of

education. Stefani, Mason and Pegler's (2007) perspective on Constructivism, as the underlying theoretical framework for digital portfolios, is worthy of repetition here.

> In the constructivist theory, the emphasis is placed on the learner or the student rather than the teacher or instructor. It is the learner who interacts with content and events and thereby gains an understanding of the ideas or events. The learner therefore, constructs his or her own conceptualizations and solutions to problems; learner autonomy and initiative are not only accepted, but actively encouraged. Furthermore, the process of discussion, reading other learners' messages and receiving feedback on one's own messages, provides the environment and scaffolding necessary for higher order thinking" (p.32).

Constructivism sits at the opposite end of the spectrum from a behaviorist approach to learning that, as Cobb (1988) notes, focuses on the notion that learning consists of the transmission of established facts, skills, and concepts (by authoritative adult teachers), which are, subsequently, to be absorbed by students. In dismissing the notion of learning as a process of transmission and absorption, Cobb suggests that knowledge can only be constructed by the learner. With respect to math, the author references Piaget's contention that "mathematical ideas are *made* by children, not found like a pebble or accepted from others like a gift (Sinclair, in Steffe and Cobb, 1988). As a radical constructivist, Cobb contends that math can't be taught. He sees math as a way of thinking that cannot be delivered by the teacher; rather mathematical thinking is attained when students engage prior knowledge and experience in an active process of exploration and reflection that helps them begin to make sense of the world around them. "In other words, students do not "discover" the way the world works like

Columbus found a new continent. Rather they *invent* new ways of thinking about the world" (Sinclair, in Steffe and Cobb, 1988, p. 33).

In helping to arrive at an understanding of meaning, Smagorinsky (2001) refers to the work of Vygotsky (1978) and his ideas regarding higher mental processes, particularly his theory on "zones of proximal development." This theory holds that learners must build upon prior knowledge. The goal for educators is then to support learners as they move through a zone just beyond what they already know, using their prior knowledge to move to another level in a scaffolding process. As noted in the first chapter of this dissertation, Bruner (1986) also emphasizes the idea that learners construct new knowledge by building on what they already know. Good learning, he writes "should encourage extrapolation, manipulation and a filling in the gaps, just beyond the learner's existing knowledge" (p.19).

Digital Portfolios: Reflection and Meta-cognition.

The constructivist view that learners must build upon prior knowledge is directly linked to the concept of meta-cognition and reflection (Dewey, 1910; Bransford et al., 2004; Bruner, 1986; Smagorinsky, 2001; Steinberg, 1998; Vygotsky, 1978). Zubizaretta (2004) writes, "The essential purpose of the electronic portfolio is to improve student learning by providing a structure for students to reflect systematically over time on the learning process and to develop the aptitudes, skills and habits that come from *critical reflection*" (p. 15). The National Learning Infrastructure Initiative (NLII, 2003) offers this definition of the digital portfolio: "A collection of authentic and diverse evidence, drawn from a larger archive representing what a person or organization has learned over time on which the person or

organization has *reflected*, and designed for presentation to one or more audiences for a particular rhetorical purpose"(p.12). Moritz and Christie (2005) (referring to the works of (Barrett, 2000; Galley, 2000; Graves, 1992) define E-Portfolios as " tools to motivate, encourage, and instruct students in the classroom: Students become *reflective learners* as portfolio use is expected to foster self-analysis, goal setting, and a sense of self-motivation by the learner" (p.31).

Bransford et al. (2000) suggest that a meta-cognitive approach to instruction "can help students learn to take control of their own learning by defining learning goals and monitoring their progress in achieving them" (p.18). The authors also refer to meta-cognition as a sort of internal dialogue. They also suggest that this is not necessarily a skill that people will automatically develop on their own. The authors citing Hatano (1990) offer this insight about this "internal dialogue":

> In research with experts who were asked to verbalize their thinking as they worked, it was revealed that they monitored their own understanding carefully, making note of when additional information was required for understanding, whether new information was consistent with what they already knew, and what analogies could be drawn that would advance their understanding. These meta- cognitive monitoring activities are an important component of what is called adaptive expertise (p. 42).

Bransford et al. (2000)and Hatano (1990) suggest that students can be taught these meta-cognitive strategies. "The model for using the meta-cognitive strategies is provided initially by the teacher, and students practice and discuss the strategies as they learn to use them. Ultimately, students are able to prompt themselves and monitor

their own comprehension without teacher support" (Hatano, 1990, p.42).

Numerous references are made in the literature regarding the importance of providing learners with clear directions, support, and practice opportunities to develop competences, as reflective writers, or else the digital portfolio simply becomes a repository and nothing more (Jafari and Kauffman, 2006; Stefani et al., 2007; Zubizaretta, 2004). Dewey's comments on this issue proved valuable to this issue:

> Reflective thinking is always more or less troublesome because it involves overcoming the inertia that inclines one to accept suggestions at their face value; it involves willingness to ensure a condition of mental unrest and disturbance. Reflective thinking, in short, means judgment suspended during further inquiry; and suspense is likely to be somewhat painful…To maintain the state of doubt and to carry on systematic and protracted inquiry - these are the essentials of thinking (Dewey, 1910)

Schon (1983) offers several important contributions to an understanding of reflection and learning. He, likewise, recognizes the importance of providing a structure to support learners as they develop reflection. Schon's "Ladder of Reflection" presents a model for supporting the interactions between teacher (or coach) and learner, based on the analogy of a ladder with many steps. Movement up a rung requires reflection on an activity; down a rung entails a transition from reflection to engagement in an activity. Schon visualizes the coaching process as a ladder of reflection where students and faculty reflect on their actions or prior reflections as well as on each other's actions/reflections. This type of a coaching process calls for frequent reflection and timely feedback (Schon, 1983)

Schon's concept of " Reflection *in* Action" encompasses a thoughtful monitoring of what is happening, as a learner engages in an activity in real-time (what the author labels "action-present"). This type of reflection, as suggested by Schon, involves a constant questioning of assumptions and looking at problems from new perspectives. As opposed to a trial and error approach to an activity, reflection *in* action. As such, it encourages a learner to continually monitor what is happening as an activity unfolds. When in the course of an activity, something occurs that differs from the expected, reflection *in* action helps the learner to think through *why* something is different, *what* is happening, *how* it contrasts with what the learner previously understood or believed.

By contrast, Schon's "Reflection *on* Action" refers to a process of reflection occurring after an event or activity has been completed. Schon writes, "We reflect *on* action, thinking back on what we have done in order to discover how our knowing-in-action may have contributed to an unexpected outcome" (Schon, 1983, p. 26).

Another central theorist in the literature on reflection includes the work of Kolb (1983) and his cycle of experiential learning. Kolb posits that learning involves four stages of learning. As learners mature, they are able to cycles through four stages that include (a) Concrete Experience, (b) Reflective Observation, (c) Abstract Conceptualization, and (d) Active Experimentation. Kolb's theory positions reflection as an integral part of a four-dimensional cyclical learning process that also incorporates experiencing, thinking, and acting. In Kolb's model, reflection helps a learner make sense of experiences, clarifies thinking about those experiences, and sets the stage for a next set of actions. As Dewey's earlier comments suggest, engagement

in reflection can be highly demanding--cognitively, emotionally and physically. Kolb's theoretical proposition places reflection as an indispensable part of an experiential learning process. Current initiatives such as Multiple Pathways and contextualized Project Based Learning (PBL) in small schools place a high premium on experiential learning. These efforts to engage and motivate learners via immersion in meaningful real-world problems highlight the importance of sustained reflection, both *in action* and *on-action.*

As previously noted, a key reference point for this study was Barrett's REFLECT initiative which is the first national research project on electronic portfolios in secondary schools in the states of California, Arizona, New York, New Jersey, Michigan, Tennessee, Ohio and Maryland. "The REFLECT Initiative was "a 24-month action research study of the impact of electronic portfolios on student learning, motivation, and engagement in secondary schools. In May 2005, more than 25 schools or districts were accepted to participate in this mixed-methods study. "The project engaged more than 3,000 secondary school students from across the country in the use of web-based electronic student portfolio tools" (Barrett, 2005, p. 4). The central question of the study was, "What is the impact of electronic portfolios on student learning, motivation, and engagement in secondary schools?"

The REFLECT Initiative investigated several key questions, using a variety of methods, including online surveys of students and teachers, focus groups, interviews and observations. The overarching question was: How do e-portfolios provide evidence of deep learning? The study report referred to Cambridge's (2003) definition, "Deep learning involves reflection, is developmental, is integrative, is self-directive,

and is lifelong."

Barrett (2005), a nationally recognized expert in electronic portfolios and the principal investigator of the REFLECT initiative, concludes in her paper (presented at the 2008 AERA conference) that, based on the limitations of the school sites selected for the study and the broad reach of their investigations, they were unable to adequately address this question. Barrett (2008) writes:

> Based on that [Cambridge's] definition of deep learning, it would be impossible to answer that question based on two years of data, from schools that, for the most part, went through the motions of implementing this project at a very surface level. This is not to criticize the teachers or the students involved in this project. For most of them, portfolio development was a brand new experience. The issue raised is simply too complex to address in a short period of time. The emphasis of the initial selection of the schools participating in this study was for *breadth*, involving as many schools as possible, and not *depth"*. As a result of a collaborative decision by the team planning the study, it was concluded that "the project could not explore deep learning" (p. 18).

A review of the final REFLECT study report revealed shared characteristics at the 25 sites that created obstacles to addressing the potential connections between digital portfolios and deep learning. All the sites (except for one) were implementing E-portfolios for the first time. Although the prior integration of technology varied between sites, none of the schools had maintained a culture that embraced technology as an integral of the learning process. Teachers involved in launching the use of E-portfolios were working, either in isolation or (at most) paired with another teacher.

Support for the use of E-portfolios from administrators was limited. The limitations of the Reflect initiative underscored the need to pursue a study that would seek out students' voices, describe their experiences in creating and using digital portfolios, as well as examine any connections to a meta-cognitive approach to learning.

Participatory Learning and Development of Social Capital

The evolution of digital portfolios may best be viewed as the convergence and expansion of two tightly interwoven strands. The first strand entails the application of digital technologies in developing a dynamic archive of work. If the archiving is done well, it provides a visually compelling medium for presentation, assessment (by self and others), future recall, and reflection. This strand will continue to evolve as new technologies emerge for learners to grow as the creators of content and architects of an electronic portfolio structure, through which they present and interact with that content.

Many exciting examples of digital portfolios, incorporating highly creative expressions developed with cutting edge digital media such as video production, photo editing, illustration, animation, text editing and voice recognition technologies, continue to emerge. (Jafari and Kauffman, 2006; Stefani, et al.2007; Zubizaretta, 2004). Innovations in digital media, like the above, present a new arsenal of tools for the articulation of ideas and meaning, hence their potential impact on learning may be enormous. As Gee (2009), however, stresses, critical research on the connections between digital technology, literacy, and learning is urgently needed in order to develop a deeper understanding of this potential and to innovate strategies to realize that potential.

The second intertwined strand of digital portfolio evolution is tied to the explosion of digitally connected networks that have given rise to phenomena such as social networking sites (e.g. FaceBook and MySpace) and a myriad of online friendship and interest driven forums. Davidson and Goldberg (2009), while not writing specifically about digital portfolios, offer the following explanation of their motives for the development of their forthcoming book entitled *Digital Media and Learning* (set for publication in 2010):

> Our charge was to accept the challenge of an Information Age and acknowledge, at the conceptual as well as at the methodological level, the responsibilities of learning at an epistemic moment when *learning itself* is the most dramatic medium of that change. Technology, we insist, is not what constitutes the revolutionary nature of this exciting moment. It is, rather, the potential for shared and interactive learning that Tim Berners-Lee and other pioneers of the Internet built into its structure, its organization, its model of governance and sustainability. This is an idealistic claim about the primacy of learning. We argue that the single most important characteristic of the Internet is its capacity to allow for a worldwide community and its endlessly myriad subsets to exchange ideas, to learn from one another in a way not previously available (p. 2).

Stand alone digital portfolios (not connected via the internet), like their paper based counterpart, will no doubt continue to play a role in education. However, the convergence of digital portfolios with unprecedented forms of interconnectivity creates fertile grounds for new modes of learning that are yet to be understood. This

convergence seriously challenges the traditional power hierarchy of learning institutions (Davidson and Goldberg, 2009). The role of the adult "teacher," as the authoritative expert, diminishes, when the definition of classrooms are no longer limited by the identification of physical spaces and structured procedures for delivering instruction. Digital portfolios, using an array of creative media, allow learners to communicate *who they are*, what their beliefs, values, personality, cultural affiliations are, and *what they know, including* their experiences, understandings, skills, perceptions and opinions, to a community of learners unrestricted by limitations of geographic proximity. This radical shift in terms of where and how learning occurs does not diminish the importance of teachers. However, it demand a dramatic shift away from a teacher's role, as the authoritative expert, to that of facilitator, guiding learners to develop capacities for constructing and articulating meaning out of a vast array of digital interactions and information.

As previously noted, this requires that students assume the locus of control for their own educations. The idea of the teacher as facilitator is germane to *situated cognition theory of learning*. An important model within situated cognition is the cognitive apprentice. In this model, teachers (which could easily include other "experts" within a learning community), provide scaffolded guidance. As the learner develops competence, the teacher's guidance can fade back, encouraging the student to assume greater control of their learning. (Brown, Collins, & Duguid, 2007).

The notion of communities of learners facilitated through digital portfolios is echoed by Zubizeretta (2004) who, in turn, cites Campbell, Melenyzer, Nettles and Wyman (2000).

> Students left alone to do portfolio work…tend to focus on organizing and justifying documentation of what they have done well. It takes encounters with peers, faculty facilitators and members of the larger professional community to challenge progress toward growing and changing, setting new goals, and designing new strategies for professional development…. The more collaborative a portfolio work becomes, the greater the growth in meeting the standards of higher-level learning (pp. ix-x).

The description of a learning community put forward by Feldman (2000) is further helpful in developing an understanding of the role of digital portfolios in promoting an electronic community of learners. The author notes that the dominant education model of the 20th century focused on the individual. He attributes this to a high degree of emphasis on Piaget's developmental theories, which posits that the learner is viewed as a "lone seeker of knowledge" (p. ix). In contrast, the author refers to an emerging 21st century model of education influenced by Vygotsky's (1978) theories of social constructivism. Feldman writes, "There is a movement away" from a focus on the individual, to one that recognizes the contribution of others to every individual's learning (Feldman, 2000, p. xiii).

Yosso (2005) argues that our current educational system fails to adequately value the assets that students of color bring to school. The author refers to those assets as a form of *community cultural wealth* and offers six major categories that include the following:

> *Aspirational capital* refers to the ability to maintain hopes and dreams for the future, even in the face of real and perceived barriers.

Linguistic capital includes the intellectual and social skills attained through communication experiences in more than one language and/or style.

Familial capital refers to those cultural knowledges nurtured among *familia* (kin) that carry a sense of community history, memory and cultural intuition.

Navigational capital refers to skills of maneuvering through social institutions.

Resistant capital refers those knowledges and skills fostered through oppositional behavior that challenges inequality. (p. 77-78)

Social capital can be understood as networks of people and community resources. These peer and other social contacts can provide both instrumental and emotional support to navigate through society's institutions.

The potential for web-base digital portfolios to support new forms of learning communities suggests that they in turn can impact the expansion and sharing of *community cultural wealth* and in turn impact how that wealth is valued. Acosta and Liu (2009) contend that electronic or digital portfolios offer great promise for expanding Yosso's 4th category of cultural wealth i.e. social capital:

> In traditional academic learning environments, it is difficult for students to make meaningful reflections of the knowledge they have learned and the contribution they can make to society because of their lack of connection with society and the understanding of societal needs. E-Portfolios can extend learning beyond the campus and foster learning community. E-Portfolios help students set up social norms and connections that will contribute to social capital. Social capital has been defined from different perspectives; the central

> meaning of it is clear—using collective power and resources to improve and benefit society and the individual through strong relationships and active interactions. This is exactly the objective of developing solid and well-grounded E-Portfolios (p.19).

Yosso (2005) points to a critical issue regarding access to economic capital that must be addressed when thinking about how technologies, such as digital portfolios can impact education . "For example, middle or upper class students may have access to a computer at home and therefore can learn numerous computer-related vocabulary and technological skills before arriving at school. These students have acquired cultural capital because computer-related vocabulary and technological skills are valued in the school setting. (p.76) While not a focus of this study, it is critical to recognize that sufficient funding to provide access to technology will be a critical determinate impacting the potential of digital portfolios to support learning for all students.

As noted by O'Brien (2009), "E-Portfolios are blossoming throughout K-16 education" (p.75). Ehley (2006) stresses, however, that most current examples of digital portfolios are *showcase portfolios*. Such portfolios fall into the first *strand* of digital portfolio evolution discussed earlier in this chapter. This strand entails the application of digital technologies enabling people to develop a dynamic archive of work that, if done well, can provide a visually compelling medium for presentation and assessment.

The findings presented in the next chapter illuminate this first strand by highlighting the experiences of high school students, as they engaged in the creation

and use of digital portfolios. The data, analysis, and interpretations offered in chapters four and five also provide insights regarding the second strand of digital portfolio's value: the potential reshaping of how people learn through dynamic interconnections of digital portfolios.

IMPLEMENTING ELECTRONIC PORTFOLIOS

IMPLEMENTING ELECTRONIC PORTFOLIOS THROUGH SOCIAL MEDIA PLATFORMS: STEPS AND STUDENT PERCEPTIONS

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ABSTRACT

Over the last two decades, students and teachers, across educational levels and disciplines, have been subject to a variety of school reform efforts. Nevertheless, some instructional practices, such as portfolio assessment, persist and grow in popularity even in the midst of changing educational reform goals and shifting priorities. Teacher education programs have used paper-based portfolios for more than three decades. Recently, institutions have migrated to electronic portfolios since these provide several advantages. Early models of these systems required special technical skills, hardware, or fee-based contracts with service providers. The newest iteration of portfolio platforms are based on social media applications, which are easy to use, free, and customizable. However, the accelerated adoption of social media applications as repositories for student portfolio content has produced several gaps in the literature. Three of these include steps for implementing electronic portfolios in social media platforms, instructional methods for soliciting quality entries from students through questions and prompts, and student perceptions about using social media as a repository for electronic portfolio content. Results from a case study identifying student perceptions of combining social media and electronic portfolios are examined. Future lines of inquiry are discussed.

KEYWORDS

Blog, case study, education reform, electronic portfolio, social media, teacher education

I. INTRODUCTION

In 2007, the former United States Secretary of Education, Margaret Spellings, convened a commission on the future of higher education [1]. The commission suggested several changes for improving colleges and universities. While most of the recommendations have gone nowhere, some have coincided with actual reforms. Although inconsistently adopted by institutions, two changes of this type include posting performance-related data to institution websites, and using standardized tests to allow for comparisons between colleges on student performance measures [2].

Accountability, transparency, and continuous improvement are the ideas reformers call upon to rationalize these initiatives. Nevertheless, teachers and administrators in K-12 settings have been contending with similar attempts at educational improvement since the 1990s, under the auspices of America 2000, Goals 2000 and No Child Left Behind legislation [3-4] Similarly, teacher education programs have long dealt with oversight measures, both from state level education boards and professional accrediting organizations.

An important objective woven into all of these supervision-related strategies, regardless of the context within which they are deployed, is to improve student achievement and produce competitive workers for life in a global marketplace. In the case of higher education, at least according to the Spellings Commission, this goal is reached by increasing student test scores, while reducing costs [1]. Likewise, for

those teaching and learning in K-12 settings, it means improving test scores through elaborate systems of itemized standards, yearly assessments, and published achievement results, with sanctions for failure.

Like other levels and branches of education, teacher training programs have not escaped outcome-based reform. Along with K-12 educators, faculty working in teacher education programs are required to integrate published lists of professional knowledge and skills, derived from professional organizations, such as Interstate Teacher Assessment and Support Consortium, and more often, from State legal code. These lists outline what new teachers are supposed to "know and be able to do." Like other systems, these standards are paired with assessments, which measure a variety of outcomes, such as dispositions, content knowledge, pedagogical knowledge, and professional growth. The battery of assessments that teacher candidates and faculty contend with is increasing. The most recent example is Teacher Performance Assessment, which has been adopted by many states in order to improve the likelihood of winning Race to the Top Federal grant money [5].

Over the last 20 years, educators at every level have experienced changes in education, such as those exemplified by TPA. These efforts are summarized as addition, subtraction, and revision of standards and assessments, and more generally, more complex oversight policies [6] Nevertheless, some teaching and learning activities have persisted across these decades because of their perceived usefulness and empirically proven effectiveness [7-9]. Portfolio assessment, which is a popular method for showing preservice teacher competence on professional knowledge and skills, is one of these [10].

Since the 80s, professional teaching portfolios have been part of the teacher education curriculum [11]. Although there are a number of definitions of portfolio, one of the most widely cited is Shulman's, who summarized it as a "structured documentary history of a (carefully selected) set of coached or mentored accomplishments substantiated by samples of student work and fully realized... through reflective writing, deliberation, and serious conversation" [p. 23, 12]. Two of the qualities that make portfolio assessment popular as a facet of teacher education include the ability to chronicle changes in student knowledge and skills and the belief that reflective writing shapes future teaching behavior [13-14]. However, portfolios also serve a less idealistic, if not equally important, requirement. They are used to show competence on professional teaching standards, satisfying both national accrediting groups, such as National Council for Accreditation of Teacher Education, and state level licensing agencies [15].

The first portfolio models in teacher education were paper-based, typically organized in three-ring binders [16-17]. More recently, many schools of education have migrated from paper to electronic methods for storing and presenting portfolios [17]. Electronic formats vary, as do the names with which they are identified, including blog portfolios, bportfolios, digital portfolios, electronic portfolios, eportfolios, e-folios, or web-folios [11] [18].

According to Abrami and Barrett, an electronic portfolio is "a digital container capable of storing visual and auditory content including text, images, video and sound" [p. 2, 19]. Along with these functions, electronic portfolios have several advantages in comparison to paper portfolios, such as enabling users to search, retrieve, change, link, and organize narratives and artifacts [20]. Likewise, Lumpe, Wicks, and Williams identified contemporary advantages of electronic portfolios, many of which are particular to social media platforms, including tagging entries for organization, data mashup integration, and rich site summary (RSS) notification to promote peer assessment [18]. One of the most significant differences is that social media-based portfolios are readily accessible to users, peers, instructors, and public spectators.

Gibson and Barrett distinguished between two types of electronic portfolio platforms, including generic tools and customized systems [21]. According to these authors, generic tools include "word processing, HTML editors, multimedia authoring tools, portable document format (PDF), and other commonly used productivity software" [p. 559, 21]. Alternatively, customizable systems are identified by the use of "servers, programming, and databases" [p. 559, 21].

However, Gibson and Barrett [21] used these categories to describe electronic portfolio platforms several years ago. Since this time, a host of new online applications have emerged, which require even fewer technical skills and less specialized hardware in comparison to what Gibson and Barrett suggested less

than a decade ago. Most of these platforms are divisible into one of three categories, including add-on, independent, and social media [22]. Add-on portfolios are extensions of existing learning management systems, such as Mahara with Moodle, Angel e-portfolio with Angel, and ePortfolio.org with Blackboard. Alternatively, independent systems do not require a preexisting learning management system, but function without additional software or services. Examples of independent systems include Chalk and Wire, Live Text, and Task Stream. Social media portfolio tools include Web 2.0 applications that allow users to store and present content online. Examples include WordPress.com, Edublogs, Blogger.com, Wikispaces.com, Weebly.com, and Google Sites.

An important commonality between these platforms is that they are accessed through a web browser. Another is that they employ digital dashboards for monitoring and adding features and content. Some systems require on-site servers and storage, whereas others do not. Each platform involves its own set of complexities, depending on its design. As such, each requires users to learn and practice adding entries and adjusting display options. However, unlike electronic portfolio systems of the past, users do not need specialized skills or hardware [23]. Moreover, ease of use is sure to increase as programmers improve dashboard interfaces. Likewise, many students are already familiar with internet page authoring through applications like My Space, and Facebook.

The most significant difference between these platforms is cost, framework, and open or walled-garden access. The software for Mahara is free, but requires a server or web hosting with domain name. Alternatively, ePortfolio.org costs between $10 and $30 per user per year. Chalk and Wire, Live Text and Task Stream cost between $20 and $28 per user per year. Alternatively, social media applications are free, but can include file size upload limitations or other restrictions. For example, WordPress.com will display advertisements on blogs that receive multiple visitors, although users can eliminate this feature by paying $30 per year.

Add-on and independent platforms provide program administrators with customizable templates for uploading and presenting content. However, in order to improve production efficiency, these templates represent a limited number of structures and options. The most prominent features include text boxes, drop-down questions, and file attachment buttons. Users construct their portfolios by uploading assignments into predefined spaces and completing reflective response questions for each upload. Add-on and independent platforms also enable users to submit the entire portfolio, or select portions, for assessment to a designated person. Additional options include assessment features, such as integrated rubrics and grade book [24]. Social media applications do not provide users with a framework, but they can be customized using general editing techniques, such as adding pages, widget tools, and a theme.

Another difference between platforms is support. For example, subscribers to Chalk and Wire, LiveText, and Task Stream have access to various portfolio-specific support materials, such as online orientation, on-site training, webcasts, email correspondence, and custom guides. Users of social media platforms can also access support materials. However, these are limited to general forums and instructional documents.

Vendor-based portfolio designers generally use a walled-garden approach, which means that access to portfolio content is dependent on assigned security clearance, similar to the kind of access instructors and students encounter with learning management systems. Alternatively, social media platforms are public, unless the user restricts viewing by requiring login and password access.

II. LITERATURE RELATING TO SOCIAL MEDIA PORTFOLIO PLATFORMS

Predictably, there is a dearth of peer reviewed research pertaining to the use of social media portfolio platforms because of the pace with which these technologies are being implemented in higher-education. For example, searching the Education Resources Information Center database using the keywords electronic portfolio and blog produced six results. Likewise, searching for the keyword social media and portfolio produced one result.

Among these, Chuang investigated the effects of having 31 education students use Blogger and WordPress to record reflections and post artifacts for 10 months [23]. As part of this study, Chuang discussed advantages and disadvantages of both blog platforms, such as ease of use and storage space limitations [23]. However, the primary focus of this study presented an analysis of students' portfolio content.

Two additional studies, one by Klages and Clark, and another by Hsu and Wang, examined the effects of integrating blogs to improve basic writing and reading skills with undergraduate students [25-26]. Both studies, which involved a combination of qualitative and quantitative measures, reported notable but inconclusive results.

Bonk and Zhang proposed an instructional model for teaching students in online courses [27]. The authors emphasized reflective activities as a component of this model, along with suggesting blogs and electronic portfolios as a suitable method for containing and presenting reflective writing. Similarly, Sawmiller delineated the uses and advantages of blogging as an instructional practice for enhancing collaboration and achievement with secondary science students [28]. This article also devoted a small portion of text to describing implementation, such as considering the Family Educational Rights and Privacy Act when posting electronic portfolio content, such as student images, online [29].

In another summary, Waters surveyed the development of various electronic portfolio platforms, along with providing an analysis of strengths and weakness of several, such as Epislen, Desire2Learn, and Mahara [22].

In a significant departure from the studies and summaries already identified, Kim, Ng, and Lim described a search application under development, which is capable of presenting data stored on various cloud services, such as YouTube, Facebook, and Flickr, through a semantic web interface [30]. The authors suggested that the application, titled Private-Public data index system, could be used for assembling electronic portfolio content from a user's cloud-based data.

Collectively, these studies add to the growing body of literature on electronic portfolios in the areas of content analysis and future trends. However, they do not address aforementioned gaps in the literature.

III. STEPS FOR IMPLEMENTING ELECTRONIC PORTFOLIOS IN SOCIAL MEDIA PLATFORMS

Although implementing electronic portfolios using social media platforms will vary depending on individual need and institutional requirements, there are some common steps. The first of these is defining the purpose and scope of the portfolio. Barrett summarized purpose and scope of electronic portfolio keeping around three activities, 1) including promoting student reflection on evidence of learning, 2) showcasing accomplishments, and 3) documenting competency on accountability standards [31]. For example, electronic portfolios in teacher education programs are used for documenting preservice teacher knowledge and skills [32-33]. Alternatively, they are also used for securing institutional accreditation [15]. If, as is the case in teacher training, an electronic portfolio is used for multiple purposes, then communicating these to users during setup justifies the expenditure of time and resources. Determining the range of time for which the portfolio is used is another factor influencing setup. Implementing an electronic portfolio for a single class may warrant a rudimentary structure and interface, such as using only the blog feature of WordPress to add text, without requiring the use of additional options, such as pages, widgets, and multimedia attachments. Alternatively, implementing an electronic portfolio across multiple years requires investing time to create a model, disseminate instructional materials, and establish methods for scoring. Unlike the single-class project approach, long-term use of portfolios for licensing and credentialing requirements means securing participation from multiple instructors and program staff. In addition, issues relating to *when* and *how* students add content to their portfolios, along with implementing commensurate assessment procedures, involves system-wide planning and administrative support.

Although there are a number of social media platforms which serve as electronic portfolio containers, the

most common include Wordpress, Blogger, Google Sites, and Weebly. The interface for each of these is different, even though they require similar levels of web editing skill. However, Google Sites and Weebly enable users to login using Google Drive and Facebook account information, respectively. On the one hand, this simplifies account setup and login, but it also networks multiple social media applications, which students may perceive as undesirable.

Creating and testing temporary trial portfolios is an effective way for instructors or administrators to decide on a particular platform. Criterion useful for making comparisons between platforms include the amount of personal information required for creating an account, simplicity in steps for adding and accessing content, and whether the platform displays ads. Trial blogs and websites can be abandoned without consequence if, upon experimentation, the platform is determined to be insufficient.

For example, in a pilot study conducted by one of the authors, two intact groups of students created portfolios using different Web 2.0 tools. The first group used Google Sites to create and edit narratives, documenting how they demonstrated competence on professional standards. Google Sites served as a website, specifically a wiki environment where students could easily edit pages as they acquired new evidence to document. Faculty found the portfolios easy to navigate, but found assessing activity or growth challenging, as it was not clear when or where content changes had been made. The second group used WordPress.com to reflect on learning and document how standards were met. Students wrote blog posts to reflect on their learning. They used the category feature in WordPress to identify which standards where addressed in each reflection. Finally, they used the Pages features to write meta-reflections, which served as narratives for demonstrating competency on each standard. Faculty found the sites both easy to navigate and easy to track growth. Both groups reported positive experiences. Nevertheless, the blogging features of WordPress enabled students to engage with Barrett's suggested purpose and scope of electronic portfolio keeping more readily in comparison to Google Sites.

Once a platform has been selected, then a model is constructed for replication by students (model shown at http://sputeacher.wordpress.com). An effective model shows the general structure of the portfolio, such as number of pages and location of links, along with type and location of add-on features, such an archive and tag cloud. The characteristics of superior portfolio entries, both with regard to format and content, are also shown through example postings. The model builder may add an auxiliary page to present instructions and support materials.

As part of the setup process, students require instruction regarding appropriate use of their portfolio. One authoritative source for this is the International Society for Technology in Education, which defines expectations for demonstrating digital citizenship [34]. Students practicing digital citizenship use technology in 1) safe, legal, and responsible ways; 2) exhibit a positive attitude toward technology for collaboration, learning and productivity; 3) demonstrate lifelong learning in the area of technology; and 4) promote values underlying use of technology in education [34]. Another source, relating to students and instructors, is the Family Educational Rights and Privacy Act [29]. One statute in FERPA prohibits schools from disclosing personally identifiable information derived from education records. An instructor who posts grades or evaluative marks to a student's online portfolio risks violating this requirement. However, FERPA does not prohibit students from choosing to release personal information to third parties, so instructors who request that students create personal accounts to access social media for academic purposes is permissible. Moreover, none of the language in FERPA prohibits students from posting comments on the portfolio of a peer. Similarly, FERPA does not prohibit the disclosure of directory information so that instructors or administrators may catalog the URL location of students' electronic portfolios and display these online.

Standards and regulations set by ISTE and FERPA promote appropriate use of social media portfolios. Nevertheless, there are additional precautions to consider. For example, students should be discouraged from showing personal information, such as phone number, birth date, and address. Similarly, students completing internships increase the possibility of an unfavorable experience by revealing the identities of participating institutions and specific persons, such as mentors. This is especially true when portfolio entries contain descriptions that are overly critical, biased, or error prone. If the portfolio shows these

kinds of deficiencies then it becomes a liability, both in terms of displaying academic competency and securing future employment opportunities. Students using portfolios constructed in social media containers are more vulnerable to this problem, since content is open for public viewing.

IV. INSTRUCTIONAL PRACTICES FOR PROMPTING QUALITY PORTFOLIO ENTRIES

Training and instruction regarding these issues improves the likelihood that students fill their portfolios with information that fulfills the purpose of the portfolio. Nevertheless, eliciting quality entries from students requires the same level of attention and effort as other learning activities.

One of the factors influencing the quality of portfolio entries is prompting [35]. Initially, when students are asked to reflect on their learning or experiences, they tend to use description, opinion, and personal anecdote [16] [36]. Although these writing formats are useful, they do not enable the same level of reflection and self-assessment as characterized by analytical or expository writing [11-12].

There are a number of methods for prompting writing that assists students in contributing quality entries to their portfolios. However, writing prompts, either as questions or statements, are among the simplest to create and most effective to use [37-38]. For example, students summarize assigned text reading passages and elaborate on the implications of the subject matter for practice. Alternatively, students compare and contrast competing models, theories, or ideas, analyzing the strengths and weaknesses of each.

Presenting an item to students for analysis is another prompting method. For example, in the case of teacher education, one type of item is a work sample. Portfolio users can analyze the sample as evidence of student learning, including progress toward the learning objective, gaps in understanding, and subsequent steps of instruction. Case analysis is a variation of this method, which substitutes a situation or scenario for analysis instead of an item. Question strands for conducting case analyses include 1) identifying problems, 2) proposing solutions, 3) listing advantages and disadvantages of recommendations, and 4) evaluating outcomes. An asset related to this activity is that users can include items and case scenarios as part of the analysis, uploading them with the entry as an attachment, or inserting them as images, for reference.

When students use their portfolios for evaluating their own learning, they are often required to include artifacts as evidence or proof of achievement. As part of this process, students compare their accomplishments to a set of professional or program standards along with an artifact for evidentiary support. Artifacts include assignments from previous coursework, images showing participation in an event, narratives describing internship experiences, and the like. Converting artifacts to portable document format (PDF) or screenshot images simplifies access for viewers. Similar to previous methods, structured questions or prompts facilitate quality writing for this type of entry, such as 1) description of the artifact, 2) description of how the artifact shows evidence of meeting related professional standards, 3) assessment of competence gained from the experience, 4) analysis of impact on professional effectiveness, and 5) prediction of future training for improvement [36].

A final method, descriptively named *blog buddies*, engages students through a system of peer assessment. Blog buddies are assigned pairs of students who read and comment on blog entries over the course of a class. Advantages of this method include accountability for meeting submission deadlines, guarantee that posts are read, and reduction in the amount of entries an instructor is responsible for assessing. One facet of blog buddies is that students receive credit for their own post after they have written a comment on their buddy's post.

V. STUDENT PERCEPTIONS OF COMBINING SOCIAL MEDIA AND ELECTRONIC PORTFOLIOS

Another important issue, along with implementation and prompting is student perceptions regarding the integration of social media with learning. The reason most people use social media is to share personal and professional activities, and to monitor the activities of friends, colleagues and family. The primary

use of applications like Facebook, Twitter, Pinterest, and Google+ is to promote these types of online interactions. Presenting professional qualifications and locating prospective employers is another prominent use of social media, as shown through sites such as Linkedin. Blogs stimulate another set of presumptions among students. Often, blogs are defined as online diaries, filled with personal opinions and descriptions of life experiences. Fewer students see connections between social media, such as blogs, for educational purposes. Nevertheless, Couros has suggested a model for how teachers integrate social media and traditional resources to create personal learning networks [39]. Similarly, the National Education Technology Plan encourages teachers to use social media to connect with other teachers and share resources [40].

Evidence that students possess positive and negative perceptions about combining social media with electronic portfolios is shown in the results of a qualitative case study conducted with 33 graduate students. The sample included 25 females and 8 males, enrolled in a teacher education program. Participants were asked about advantages and disadvantages of creating and maintaining an electronic portfolio using a WordPress blog during program orientation. This question was posed to participants after seeing 10 minutes of introductory information about electronic portfolios, including an example portfolio entry, and identifying WordPress as the platform. One student had previous experience with WordPress. Anonymous responses were collected using Poll Everywhere.com.

Data was organized using analytical coding, according to procedures described by Richards [41]. Analysis of data showed three categories. The first category, *progress tracking*, suggests that participants perceived electronic portfolios as a useful method for showing progress across time. Evidentiary comments for this included the following: "it is a great format for documenting and tracking growth and progress," and "the bPortfolio seems like an excellent way to document my progress over the... program." The second category, *efficiency and convenience*, suggests participants viewed electronic portfolios as useful for recording, organizing, and sharing program requirements, assignments, and accomplishments. Supporting comments included, "I like that it is online and easily accessible," and "It seems like a convenient method for our professors to determine whether we are completing the necessary components of our certification program." The last category, *content and frequency*, suggests that participants were unsure about the contents of portfolio entries and how often they would be expected to update their blog.

One point of interest is that three participants identified the portfolio as a resource to share with future employers. Four participants suggested technical skills and hardware requirements as a potential area of concern, although the majority of comments indicated enthusiasm about creating and maintaining a portfolio, with little mention of requisite computer skills.

In summary, participants perceived electronic portfolios, as a convenient method for organizing information and showing progress over time. Participants were most concerned about the content and frequency of their portfolio writing. The source of this concern likely comes from the perception that an electronic portfolio is more like an online diary, where content is inspired by the desire to publically share inner-dialogue.

Results suggest that instructors implementing electronic portfolios using a blog platform emphasize the purpose of the portfolio and specific strategies for authoring entries. In addition, significant attention should be given to training students on how to write entries that include analysis and reflection, instead of recall and description. However, enabling students to use their portfolios as an aid to learning, wherein its contents show new opinions, altered perspectives, and adoption of alternative ideas, is difficult to achieve [16] [36]. Indeed, Shepherd & Hannafin indicate that effective portfolio use involves multiform supports, such as tutorials, prompts, and even mentoring [42].

VI. CONCLUSION

Use of electronic portfolios in education is sure to increase, both for pedagogical reasons and for those dealing with assessment, accreditation, and accountability. The evolution of portfolio containers has advanced quickly, beginning with technical and hardware intensive models in the 90s, progressing to free online applications today. Researchers continue to address fundamental questions about electronic portfolios, such as their impact on achievement and influence on student development of professional knowledge and skills [16] [36] [43]. However, advances in technology have nearly outpaced models which show instructors how to integrate electronic portfolios through social media platforms. The following steps serve as a starting point for this work:

1. defining purpose and scope,
2. selecting social media platforms through experimentation and testing,
3. constructing a model,
4. instructing on appropriate use,
5. and integrating questions and prompts to elicit quality portfolio entries.

Implementation represents challenges which can be overcome with planning, experimentation, and fine-tuning. During implementation, instructors and administrators simultaneous identify strategies for prompting high-quality portfolio entries. Neglecting methods for assisting students as they add content to their portfolios results in portfolio populated with descriptions, opinions, and personal anecdotes, instead of reflection and self-assessment, characterized by analytical and expository writing. Although eliciting high-quality entries depends on purpose, discipline, and context, some general strategies applicable to multiple fields include

1. writing prompts in the form of questions or statements,
2. item analysis,
3. case analysis,
4. self-evaluation with supporting evidence,
5. and peer assessment.

Another consideration comes from the results of a case study, which suggests that students possess preconceptions about using social media as a repository for electronic portfolio content. Students interpreted electronic portfolios as online diaries. As a result, they expressed concern about how often they were expected to add entries, along with confusion about content. Students were quick to identify features of social media portfolios associated with efficiency, organization, and convenience. However, the connection between learning, exemplified through analytical and reflective writing, and portfolio keeping was identified as an attribute. Instructors and administrators interested in improving electronic portfolio performance would do well to address these types of beliefs during portfolio setup and training.

The information shown provides an initial outline for combining social media with electronic portfolio keeping, specifically through the use of blogs as portfolio containers. Additional lines of inquiry are inferred within this outline. For example, which social media platform is easiest to use for displaying electronic portfolio content? In what way can social media applications be combined to enhance portfolio entries? How does electronic portfolio performance correlate with other measures of professional achievement? These lines of inquiry represent new research opportunities for those interested in developing the educative potential of creating and managing electronic portfolios in social media applications.

VII. ABOUT THE AUTHORS

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IDEA PAPER #44

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The Learning Portfolio: A Powerful Idea for Significant Learning

John Zubizarreta • Columbia College, SC

Student portfolios have been widely known and implemented for some time in academic fields such as writing and business. Similarly, portfolios have been a staple form of documentation of performance skills in the fine arts, providing students and teachers with a method for displaying and judging evidence of best practice and samples of the full range of talent. Another popular application has been to provide a device for demonstrating the value of experiential learning or for assessing credit for prior learning. Some portfolios are shared by students and faculty advisors for the purpose of academic advising and career counseling. Also, the National Council for Accreditation of Teacher Education (NCATE) advocates the portfolio model as an effective tool for showcasing a representative breadth of acquired skills for professional success and career preparation. NCATE uses specified licensure competencies and professional standards as benchmarks against which to measure achievements signified by portfolio artifacts.

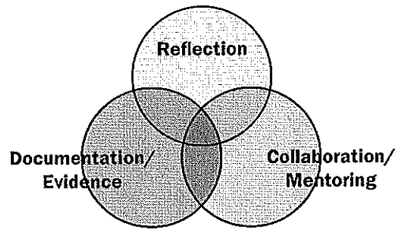
Despite the history of portfolios in certain disciplines, the portfolio approach to gauging student accomplishments and growth in learning was not adopted extensively in higher education until recently. Instead, emphasis on advanced content knowledge acquisition and traditional forms of assessment and evaluation prevailed. In English and a few other disciplines, portfolios and journals have long been employed in college classes with some regularity. But recently — following the groundswell of interest in teaching, course, and institutional portfolios — learning portfolios began to attract significant attention in college and university settings. Now, the numerous Web sites that exist for online information on portfolios, offering rich and diverse models of how portfolios are used worldwide for multiple purposes, are coming predominantly from colleges and universities around the world. Countries such as Australia, Britain, The Netherlands, New Zealand, Canada, France, Finland, Hong Kong, Mexico, Singapore, and, of course, the United States — just to name a few — are home to institutions with student portfolio programs designed to help with systematic, learning-outcomes assessment plans. Though it took time, learning portfolios have clearly become mainstream in higher education.

A Learning Portfolio Model

Recognizing that student portfolios take many forms, depending on purpose and individual or programmatic design, Figure 1 proposes a simple model for the learning portfolio, predicated on three fundamental components:

1) Reflection
2) Documentation
3) Collaboration

Figure 1 • The Learning Portfolio Model.



Any combination of two components ensures a deeper learning experience, but when students activate all three components in a portfolio project, the potential for enhanced learning is most stimulated. The result is a compact, strategically organized document that evolves qualitatively as a reflective process to represent the dynamic nature of engaged learning.

The strategic organization and selectivity of a portfolio are important dimensions of the model. A sound learning portfolio involves a concise, reflective narrative, plus selected evidence in a series of appropriate appendices. Such an approach parallels successful models for professional teaching (Seldin, 2004; Zubizarreta, 1997), course (Zubizarreta, 1995), and administrative (Seldin & Higgerson, 2002) portfolios.

The role of the collaborative mentor (a teacher, an advisor, or a peer) is to help the writer keep the portfolio manageable, current, accurate, organized, and relevant

to the purpose. As new materials are added, old ones are removed, keeping the act of revision active and critical, and continually informing the learning process.

Documentation and Evidence

What is often left out of the formula in student portfolios — though the trend is rapidly changing — is an intentional, primary focus not on skills development, but on the learning piece. This learning focus entails the deliberate and systematic attention to a student's self-reflective, meta-cognitive appraisal of what was learned, how it was learned, when it was learned best, and, more importantly, why this learning is valuable. Such meta-cognition — that is, thinking about thinking, learning about learning, focusing on the process of learning as an enriching complement to content knowledge and skills as products of education — is central to how and why portfolios deepen learning.

This is not to assert, of course, that learning does not happen when portfolios are used only as collection and organizing devices. A student does benefit simply from the thoughtful act of choosing representative samples of accomplished work (documentation and evidence) and making sense of the materials as a display. Any effort to organize one's learning experiences is a step in the right direction, moving students away from merely completing courses, recording grades, and checking off boxes on curriculum plans, and toward a more mindful understanding of the integration and potential of their learning over time. However, more enriched learning is likely to occur if the student is encouraged to come to terms self-consciously with the sources, coherence, and worth of learning. While the model of the student portfolio as simply an individual repository of selected artifacts is useful, reflection and collaboration are central to reaping the full advantages of learning portfolios.

The Importance of Reflection

Most commonly, student portfolios have been used to collect and evaluate students' work at key points in their progress, usually at the end of an academic endeavor. Campbell, Melenyzer, Nettles, and Wyman (2000) make the strong point that in a well-managed portfolio, students should realize that their effort is not simply to construct "a scrapbook of college course assignments and memorabilia." Instead, a learning portfolio should stress that the product is also a *process*, an "organized documentation of growth and achievement that provides tangible evidence of the attainment of professional knowledge, skills, and dispositions. Each portfolio is goal-driven, original, and reflective." The intrinsic merit of learning portfolios is that they involve students in the power of reflection, the critically challenging act of thinking about their learning, and constructing (and communicating) a sense of the learning experience as a coherent, unified, developmental process. Such thinking and sharing are the linchpins of lifelong, active learning. These processes help students discover, understand, and communicate what, how, when, and why they learn.

Hence, the value of portfolios in improving student learning resides in engaging students not just in collecting representative samples of their work for assessment, evaluation, or career preparation, but in addressing vital reflective questions that invite systematic inquiry:

- What have I learned? Why did I learn?
- When have I learned? In what circumstances? Under what conditions?
- How have I learned or not, and do I know what kind of learner I am?
- How does what I have learned fit into a full, continual plan for learning?
- What difference has learning made in my intellectual, personal, and ethical development?
- Where, when, and how have I engaged in integrative learning? Has my learning been connected and coherent?
- Is my learning relevant, applicable, practical?
- When, how, and why has my learning surprised me?
- What have been the proudest highlights of my learning? The disappointments?
- In what ways has my learning been valuable?
- What difference has portfolio mentoring made in my learning?

Obviously, many more questions come to mind as one begins to fashion a strategy for reflection. The underlying message, however, is that the learning portfolio is an opportunity for developing the reflective judgment (King & Kitchener, 1994) and higher-order or significant learning (Bloom, 1956; Fink, 2003) that we, as educators, desire in students of all abilities.

The Role of Collaboration/Mentoring

Meaningful reflection is facilitated best not by leaving students to their own devices in thinking about their learning, but by utilizing the advantages of collaboration and mentoring in making learning community property. Learning is enhanced by recognizing its relational values, by helping students connect individual pieces of gained knowledge to a larger puzzle of learning with ever-widening intellectual, material, ethical, social, and even spiritual implications. In other words, dissemination of facts and delivery of knowledge are acts of instruction that serve an important but limited purpose in how we think and learn. But connections, including those between mentor and student, are indispensable to significant learning.

Identifying portfolio mentors, however, can be a significant hurdle. Should the coach be the teacher in a course? Should trained students be enlisted as peer mentors? Can professional or faculty advisors serve as guides? Can students developing electronic portfolios turn to technology staff for mentoring resources? Are there ways to use interactive technology tools to provide virtual opportunities for collaboration? The questions are many, but the answer is "yes" to each. Context, resources, purpose, and other factors all play a role in helping us figure out ways to connect students with knowledgeable,

effective mentors who can assist them in cultivating substantive reflective judgment and the analytical skills needed to develop a purposeful, selective portfolio.

What Is a Learning Portfolio?

So what exactly is a learning portfolio? No single, right answer exists. A powerful complement to traditional measures of student achievement, learning portfolios engage students not only in collecting selected samples of their work for assessment, evaluation, and career development, but also in continuous, collaborative reflection about the process of learning. But such portfolio work can take a variety of forms. The flexibility of portfolio development is actually one of the strengths of the process. The portfolio is adaptable to many different purposes and the product can be on paper, on CD/DVD, on video/audio tape, on the web, or in some other creative combination of such mediums.

The learning portfolio, then, is a *flexible* tool that engages students in a process of continuous *reflection* and *collaboration* focused on *selective evidence* of learning. As written text, electronic display, or other creative project, the portfolio captures the scope, richness, and relevance of students' intellectual development and academic skills. The portfolio provides a critical opportunity for purposeful, mentored reflections and analysis of evidence for both *improvement* and *assessment* of students' learning. Such a process is a rich, convincing, and adaptable method of recording intellectual growth and involving students in a critically reflective, collaborative process that augments learning as a community endeavor.

If we can motivate students to focus on the process of their learning and not just on chalking up grades and credentials, they will find portfolio development challenging and rewarding. The payoff for students will come when they recognize that reflecting on and documenting their progress as learners reinforce the foundational elements of significant learning. The process teaches them to value formative feedback and to respond positively to incentives for progress. The portfolio, in effect, can help students transform gaps in learning into potential opportunities for improvement.

Because the portfolio emphasizes reflection, collaboration, and purposeful selection and integration of evidence of learning, it results in significant and lasting educational experiences. Portfolios can be tailored to suit many disciplinary, pedagogical, programmatic, and institutional needs — a flexibility that helps account for the continually growing use of portfolios worldwide for many different purposes in the academy. Indeed, the overwhelming number of online resources and models now available on the popular "electronic portfolio"— the digitized approach to portfolio development — can consume anyone who searches for such information on the Internet.

Portfolios now are deeply ingrained in higher education as a powerful strategy for improving and assessing student learning. They are notably useful in augmenting the kind of "higher-level," "deep," "reflective," or "significant" learning identified by educational theorists from Dewey (1910) to Perry (1970), Piaget (1971), Schön (1983), Kolb (1984), King and Kitchener (1994), and Fink (2003).

The Purpose and Contents of a Learning Portfolio

What are the contents of a learning portfolio? Again, no answer can be exclusively right or complete. Portfolios vary in purpose, and different purposes determine the diverse contents. Consider, for example, how a portfolio developed for a single course or for a field-based, experiential learning venture might differ in goals, themes, documentation, and reflective content from a portfolio constructed initially in a first-year, orientation course and later completed in a capstone senior seminar as part of a programmatic assessment plan. Some portfolios might focus exclusively on improvement, and some might be used primarily for formative assessment or summative evaluation, changing the character and content of the endeavor. A portfolio used to document prior learning for admission to an adult education program will stress mastery of content and skills, and it will include information about competencies and experiences that might be quite different from a showcase portfolio developed for an academic award.

Later in this paper, Figure 3 provides more examples of how portfolios may differ in themes and documentation, depending on purpose. Remember, however, that flexibility and adaptability are among the portfolio's keen strengths. Also, keep in mind that the medium of the portfolio — that is, whether the portfolio is on paper, on a portable disk, or on the web — will also have a bearing on composition; on access and ownership issues; and on decisions concerning how many artifacts, what kinds of evidence, and how reflection should be integrated into the portfolio.

Generally, the learning portfolio consists of a carefully reasoned, reflective narrative that, depending on purpose, captures the scope, progress, and value of learning. The reflection is complemented by an equally representative compilation of concrete evidence. A popular alternative is a number of short reflections on separate or grouped items of evidence. Much can be said, though, for the coherence and unity of reflective analysis required by a single reflective statement and overview with keyed references to documentation in an appendix. Some portfolios mix the approaches, offering individual, brief reflections for units of organized materials that demonstrate growth in particular areas of learning (perhaps correlated with stated learning goals and objectives of a course or a program), while also including a longer, thoughtful, critical analysis of learning over time. The latter usually consists of a more developed reflective narrative that is not only retrospective but also forward-looking, with goals for future improvement and application of learning.

Table of Contents

Below is a generic table of contents, organized by broad categories and certainly not prescriptive or exhaustive. The table is meant to be suggestive, inviting multidisciplinary ideas of what the actual, complex contents of a student portfolio might be. The sound portfolio will not necessarily follow the table exactly as written, but it will undoubtedly include reflections and appropriate evidence that address the categories. Remember the caveat that purpose will drive final decisions about both reflection and documentation.

1. *Philosophy of Learning* (reflective narrative[s] on learning process, learning style, value of learning). What, how, when, and why did I learn?
2. *Achievements in Learning* (records: transcripts, course descriptions, résumés, honors, awards, internships, tutoring). What have I accomplished with my learning?
3. *Evidence of Learning* (outcomes: research papers, critical essays, field experience logs, creative displays/ performances, data/spreadsheet analyses, course listserv entries, lab results). What products, outcomes do I have to demonstrate learning?
4. *Assessment of Learning* (instructor feedback, course test scores, exit/board exams, lab/data reviews, research project appraisals, practicum reports). What measures and accounting do I have of my learning?
5. *Relevance of Learning* (practical applications, leadership, relation of learning to personal and professional domains, ethical/moral growth, affiliations, hobbies, volunteer work, affective value of learning). What difference has learning made in my life?
6. *Learning Goals* (response to feedback; plans to enhance, connect, and apply learning; career ambitions). What plans do I have to continue learning?
7. *Appendices* (selected documentation). How coherently have I integrated evidence with reflections and self-assessments in the portfolio?

Note that the categories reflect a logical pattern, one that essentially mirrors sound practice for both improvement and assessment. The flow parallels the order of reflective analysis of the questions following each category, complemented by documentation in the appendix.

A brief reflective section of a few pages, plus a mindful, organized selection of integrated evidence of authentic learning, is a practical investment. The student benefits from the portfolio's efficacy in bolstering learning while at the same time creating a compelling showcase product for a job search, graduate application, or other utilitarian purpose. The teacher, too, gains a multi-faceted means of appreciating, understanding, and assessing a student's learning, using a model of "authentic" and "educative" assessment as described by Allen (2004), Suskie (2004), Wiggins (1998), and others. Also, programs and institutions have at their disposal a visible sign of learning over time for assessment, evaluation, or accreditation needs.

Crafting a Learning Portfolio Project

As a starting point for crafting a portfolio project, Figure 2 offers an exercise that prompts careful thinking about the three essential activities in portfolio development (Zubizarreta, 2004). Consider how *reflection* will be incorporated into a portfolio, how much and what kinds of evidence should support the portfolio (*documentation*), and who will provide the *mentoring* and *collaboration* so crucial to guiding substantive reflection and judicious, honest display and analysis of learning outcomes.

Figure 2 • Crafting a Learning Portfolio Project.

Crafting a Learning Portfolio Project

Think about how you would design a learning portfolio project for your classroom, program, or institutional use. First, identify the purpose of the portfolio, then address the following questions: 1) What kinds of reflective questions would you ask students to address? 2) What kinds of evidence or learning outcomes would be most useful? 3) How would you engage students in collaboration and mentoring in the process?

Purpose of Portfolio: _____

Relection	Documentation/ Evidence	Collaboration/ Mentoring

In designing a portfolio project and filling in the blank columns, keep in mind the importance of *selectivity* in the compilation of outcomes or products that comprise the appendix items supporting the reflective narrative portion(s) of the portfolio. Selectivity is best defined as *representative* rather than as *culled*, though in a showcase portfolio — used most often for job preparation, graduate school application, or similar professional purposes — the materials chosen as documentation naturally would reflect best practice. Again, purpose is a central consideration in determining the themes and evidence of a portfolio. Still, any portfolio gains a degree of credibility and is not necessarily handicapped by inclusion of artifacts that reveal the author's reflective awareness of weaknesses in academic areas or particular work applications that require improvement. In fact, a portfolio is an ideal venue for demonstrating revision and growth over time, effective responses to formative feedback, and recognition of the steps necessary to strengthen learning and actual performance in the future.

Figure 3 (see next page) helps in mapping a portfolio's purpose, themes, and evidence (Zubizarreta, 2004). The concrete evidence of learning is collected selectively in an appendix, with the materials meeting the specific purposes of the portfolio. The representation of student

work, or products, in the appendix is linked to the reflective component of the learning portfolio, and it is driven by purpose and an understanding of the portfolio's intended audience. For example, the following table suggests some representative ways in which the *purpose* of a learning portfolio strongly determines the *themes* of the reflective narrative, as well as the types of *documentation* or *evidence* selected in the appendices.

The items shown in the table are not prescriptive or exhaustive, but they help to underscore how the purpose of a portfolio drives its themes, which are supported by the evidence or outcomes of learning assembled selectively in the portfolio. Completing a similar table would be a productive exercise to add to the one in Figure 2 for crafting a learning portfolio project. In the process, and preferably in a collaborative setting for generating creative ideas and models, think about how to design a portfolio that would help capture the complexity, individuality, and value of student learning. What is the purpose driving the portfolio project? What are the salient, recurring, integrative themes of the portfolio? And what selective cache of outcomes or documentation provides the vital evidence that undergirds the portfolio's critical reflections?

Always keep in mind that while collection, selection, organization, and synthesis of artifacts constitute a valuable effort, students derive even more benefits from the power of reflection and collaboration in helping them to reach higher levels of meta-cognitive achievement. Hence, a portfolio should not simply include end products of exemplary work, but rather evidence of growth over time and demonstrations of motivation to improve learning, recognize areas of development, and reflect on learning as a lifelong process.

Conclusion

The learning portfolio is a concept that is strongly suited to enhancing learning. It challenges teachers, academic leaders, and students to:

- Examine their disciplinary-based focus on content knowledge acquisition and traditional assessment and evaluation practices without exploring the role of reflective inquiry in promoting and extending significant learning.
- Collect selective evidence of higher-level learning over time.
- Adopt authentic, *educative* assessment strategies over simpler *auditive* assessment practices.
- Engage in the benefits of mentoring and collaboration in the spirit of a genuine community of learners.

Because the portfolio, by definition, encourages the learner to gather information about learning from multiple sources, including critical reflection and self-assessment, it engages students in intellectually challenging, creative, rigorous work. It is both process and document, stimulating reflection, collaborative mentoring, and emphasis on

Figure 3 • Determining the Portfolio's Purpose, Themes, and Evidence.

Purpose	Themes	Evidence
Improvement	Development, reflective inquiry, focus on goals, philosophy of learning.	Drafts, journals, online threaded discussion, emails, statement of goals, classroom assessments, research notes.
Job Search	Career preparation, versatile skills, ambitions, potential for future contributions, flexibility.	Showcase projects, writing and communication samples, résumé, references, internship evaluations, certifications, reports/ logs, computer programs, awards, transcripts.
Writing	Voice, creativity, diverse and flexible skills, craftsmanship, facility with language, research proficiency.	Essay drafts, journal, listserv or threaded discussion entries, research papers, publications, concept maps or outlines.
Prior Learning	Mastery of content.	Products demonstrating skills and competency, references, achievement/ placement test scores, interview transcripts.
Problem Solving	Critical thinking, creativity, application of knowledge, flexibility, curiosity.	Problem-solving log, lab reports, computer programs, spreadsheet data analyses.
Field Experiences	Application of knowledge, trained skills, adaptability.	Field journals, logs, reports, video/audio tapes, photos, project leader's evaluation, grant proposal, publication.
Achievement in Major, Honors or Other Academic Program, Awards Competition	Challenge, risk, creativity, reflection, motivation, self-direction, preparation, higher-level skills, collaboration, service, leadership, value-added education.	Application or first-year essays alongside capstone retrospective essays, senior thesis/project, essays/labs/projects in draft and final forms with feedback and responses, academic presentations (programs, handouts), creative performances (video, audio, programs, reviews), service/leadership records, photos, posters, awards.

documentation of learning through detailed outcomes. It is a powerful way of providing evidence of educational growth tied to students' reflections on the content, scope, and value of their learning.

As we provide more opportunities for students to practice reflective learning, we may feel the anxiety that comes with being tyrannized by content coverage. Helping students understand the philosophy and mechanics of reflective practice takes time, experimentation, experience, and re-imagined goals. But reflection, as virtually all educational theorists have argued, is not a faddish distraction from vital construction of knowledge or honing of practical skills. Reflection deepens learning; makes learning more meaningful and relevant; makes learning more durable; and helps students own their own learning as more independent, self-directed, lifelong learners. An increasing number of institutions are, in fact, supplying alumni with ongoing access to server space, enabling graduates to maintain portfolios long after commencement, a nod toward a true conception of portfolio development as a lifelong commitment to learning (and a compelling alumni relations gambit, too!).

Paying close attention to language, we should not overlook the importance of the term "*learning* portfolios." While portfolios provide teachers and administrators with diverse, multi-source information for the purposes of assessment and evaluation, the core reason for embracing portfolio work in our enterprise of teaching and learning is to inspire our students to become active, engaged, reflective learners. The learning portfolio promotes and sustains our students' academic enrichment and personal growth, making it a powerful idea for significant learning.

John Zubizarreta is a professor of English, director of Honors and Faculty Development, and former dean of Undergraduate Studies at Columbia College. He has published widely on modern American, British, and comparative literatures; teaching pedagogy; honors education; teaching, learning, and administrative portfolios; and faculty development. Foremost among his disciplinary publications is his co-edited Robert Frost Encyclopedia *(Greenwood, 2001).*

A Carnegie Foundation/C.A.S.E. Professor for South Carolina, he has also earned recognition for teaching and scholarly excellence from the American Association for Higher Education, the South Atlantic Association of Departments of English, the National United Methodist Board of Higher Education, the South Carolina Commission on Higher Education, and other educational organizations.

John has led faculty development workshops and delivered keynote addresses worldwide, and he has mentored faculty nationwide and abroad in enhancing and documenting teaching and learning. His recent books include his co-authored Inspiring Exemplary Teaching and Learning: Perspectives on Teaching Academically Talented College Students *(National Collegiate Honors Council, 2008) and* The Learning Portfolio: Reflective Practice for Improving Student Learning *(Anker, 2004, and 2nd edition by Jossey-Bass, 2009).*

When the academic life becomes too hectic, John is an avid telemark skier; an overly ambitious, aching runner; a former six-time national champion in whitewater canoe competition; a moonstruck husband; and the adoring father of two girls who keep him busy outside the ivied walls.

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WESTPORT PUBLIC SCHOOLS
FACILITIES PROJECT SUMMARY
Summer Projects starting: July 1, 2014

SCHOOL	PROJECT DESCRIPTION	AMOUNT	PROJECT CODE	ACCOUNT	STATUS
CES	Public address system upgrades Café, PE & Room 19	$ 3,100	435-1501	Building Projects	Completed
	Health Office floor replacement	$ 4,176	437-1522	Restor/Prevent Maint.	Completed
	TOTAL:	$ 7,276			
GFS	Boiler burner upgrades	$ 7,080	435-1503	Building Projects	Work in progress.
	Fuel tank repair with pad replacement	$ 12,335	436-1517	Grounds Projects	Completed
	Carpet to Tile - Library and Library Office	$ 14,214	437-1523	Restor/Prevent Maint.	Completed
	Grate trip hazard	$ 3,420	432	Grounds Maintenance	Completed
	Installation of humidity sensor & modifying discharge air program for chilled water valve on AHU 4	$ 2,050	431	Building Maintenance	Completed
	Testing AHU # 4 servicing the Library	$ 3,890	330	Other Professional Technical Services	Completed
	Replace sheave for AHU # 4	$ 874	431	Building Maintenance	Completed
	Cleaning and rejuvenation service	$ 850	421	Contract Maintenance	Completed (2 bathrooms)
	TOTAL:	$ 44,713			
KHS	Replace K Wing rear vestibule doors	$ 3,250	435-1504	Building Projects	Work in progress
	Additional heating to Rooms 3-6	$ 18,600	435-1505	Building Projects	Completed
	Replace Kindergarten play area fence	$ 8,448	436-1518	Grounds Projects	Completed
	Replacement of stair treads & landings with rubber flooring	$ 14,827	437-1523	Restor/Prevent Maint.	Completed
	Scrape & paint exterior doors	$ 2,600	437-1525	Restor/Prevent Maint.	Completed
	TOTAL:	$ 47,725			
LLS	Cleaning rejuvenation service	$ 1,793	421	Contract Maintenance	Completed (6 bathrooms)
	TOTAL:	$ 1,793			
SES	Replace HVAC coils in AHU # 8 (Auditorium)	$ 4,800	435-1507	Building Projects	Work in progress
	Replace main hallway carpet	$ 8,238	437-1526	Restor/Prevent Maint.	Completed
	Cleaning and rejuvenation service	$ 2,261	421	Contracted Maintenance	Completed (6 bathrooms)
	Replace 3 springs on chiller	$ 9,932	437-1537	Restor/Prevent Maint.	Work in progress
	TOTAL:	$ 25,231			

SCHOOL	PROJECT DESCRIPTION	AMOUNT	PROJECT CODE	ACCOUNT	STATUS
BMS	Replace external door hardware (8 Doors)	$ 8,394	435-1509	Building Projects	Work in progress
	Replace bulbs in gym with shatterproof T5	$ 4,300	437-1527	Restor/Prevent Maint.	Completed
	Replace countertop in science lab	$ 29,500	437-1528	Restor/Prevent Maint.	Work in progress
	Installed VCT tile in Room 239	$ 4,714	431	Building Maintenance	Completed
	Install new ramp	$ 1,800	432	Grounds Maintenance	Completed
	TOTAL:	$ 48,708			
CMS	Daikin Applied Americas McQuay PFS Chiller Maintenance	$ 5,100	435-1502	Building Projects	Completed
	Locker Replacement	$ 9,200	435-1510	Building Projects	Completed
	Install Classroom T-Stat covers (QTY. 61)	$ 2,000	435-1511	Building Projects	Work in progress
	Upgrade exterior play area lighting	$ 1,980	436-1520	Grounds Projects	Completed
	Ceiling Tile Replacement	$ 20,000	437-1529	Restor/Prevent Maint.	Partially completed - Work in progress
	Clean AHU's main hallway ventilation	$ 1,903	437-1530	Restor/Prevent Maint.	Work in progress
	Fin tube radiation main entrance Boys & Girls bathrooms	$ 6,250	437-1531	Restor/Prevent Maint.	Completed
	TOTAL:	$ 46,433			
SHS	Upgrade fresh air supply for Football Locker Room	$ 23,125	435-1512	Building Projects	Completed
	Relocate wood shop transformer	$ 4,850	435 -1513	Building Projects	Completed
	Supply pipe conduit repair	$ 10,624	436-1521	Grounds Projects	Completed
	Carpet to tile one-half of LMC double classroom	$ 3,044	437-1523	Restor/Prevent Maint	Completed
	Controls black box, Band, Orchestra & Choral Rooms	$ 2,260	431	Building Maintenance	Completed
	Cleaning & rejuvenation services	$ 495	421	Contract Maintenance	Completed (2 bathroom upper Auditorium)
	New Cylinder installation (2) Loading Dock	$ 2,977	431	Building Maintenance	Competed
	TOTAL:	$ 47,375			

SCHOOL	PROJECT DESCRIPTION	AMOUNT	PROJECT CODE	ACCOUNT	STATUS
System Wide	Replace selected HVAC controls -SHS IDF7 Cooling Installation	$ 7,500	435-1515	Building Projects	Completed
	Replace selected HVAC controls SHS MDF Cooling Upgrades	$ 47,500	435-1515	Building Projects	90% COMPLETED AS OF 9/8/2014
	Tile cleaning and restoration	$ 20,504	437-1535	Restor/Maint.	Completed SES- $3600.00, SHS- $4480.00, CMS-$7200.00,BMS- $5224.00,
	Playground inspections	$ 3,900	421	Contract Maintenance	Completed.
	TOTAL:	$ 79,404			
	TOTAL:	**$ 348,658**			

PO's	**FY13/14 Budget Completed this Summer**				
145118	LLS - Kitchen Fire Suppression System Upgrade	$ 2,960	435-1472	Building Projects	Completed.
145119	Power Fitness Rooms at BMS/CMS/SHS	$ 4,700	435-1473	Building Projects	80% done still need to complete CMS
145116	BMS Library Wall	$ 12,500	435-1470	Building Projects	Completed
145115	BMS - Chiller controller board upgrade	$ 34,989	435-1469	Building Projects	completed
145060	SHS - Installation of New DDC devices for Fieldhouse	$ 15,940	431	Building Maintenance	95% done; start-up programming remains.
145059	SHS - Field House control valve replacement	$ 7,500	431	Building Maintenance	Completed
145152	SHS -Concession Stand roof	$ 4,650	431	Building Maintenance	Completed
		$ 83,239			

WESTPORT PUBLIC SCHOOLS

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To: Members of the Board of Education

From: Elliott Landon

Subject: Policy P3400 and Administrative Regulation R3400 – Capital Projects

Date: September 22, 2014

Presented to the Board of Education for review and discussion at our meeting of September 8, 2014, and amended to include recommendations from individual members of the Board at that meeting and in subsequent correspondence to me, the revised Policy P3400 and Administrative Regulation R3400 are being presented to the Board at the meeting of September 22.

Following further discussion and possible additional revision, the Board of Education may elect to approve both the policy and the regulation at that meeting. If the Board elects to do so, I have prepared a Resolution for Board approval.

ADMINISTRATIVE RECOMMENDATION

Be It Resolved, That upon the recommendation of the Superintendent of Schools, the Board of Education approves Policy P3400 and Administrative Regulation R3400, Business and Non-Instructional Operations, Capital Projects, said policy and regulation to be included with the Minutes of the Meeting of September 22, 2014.

Business and Non-Instructional Operations

Capital Projects

Purpose

The Westport Board of Education recognizes the importance of the need for sound business practices in spending public funds for required capital projects, the requirement for complying with state laws governing spending and the need for clear documentation in meeting State of Connecticut and Federal Auditing requirements.

Definition

Capital projects are those for which the Board of Education has been granted a special appropriation by the Board of Finance and the Representative Town Meeting (RTM) in an amount of $100,000 or more with a projected functional lifespan of at least 20 years.

Authority

The expenditure of funds for capital projects shall be centralized under the Director of School Business Operations who shall be responsible for all capital projects for the district. In accordance with the Westport Town Charter, the Director of School Business Operations is the designated representative of the Board of Education to act with the Finance Director of the Town in accounting for all capital project expenditures.

Bidding

For capital projects meeting the definitional threshold, formal bid(s) must be sought.

Reference: Connecticut General Statutes

10-220 Duties of boards of education

Policy adopted:

Business and Non-Instructional Operations
Capital Projects

Purpose
To ensure that capital projects are completed in a timely basis within approved financial guidelines as determined by the Board of Education, the Board of Finance and the RTM without sacrificing quality or educational purpose and comply with federal, state, town, and Westport Public Schools requirements, as well as generally accepted business practices.

Procedures
With the initiation of an approved capital project, the Director of School Business Operations shall initiate the following:

1. Issue to the Board of Education quarterly tracking reports with project timelines that include:
    - 1.a. Town Capital Budget, Actual to Date, Balance and Variances
    - 1.b. Board of Education Operating Budget Expenditures
        - 1.b.i. Operating Budget Total
        - 1.b.ii. Actual to Date
        - 1.b.iii. Object Codes
        - 1.b.iv. Operating Budget Balances, both Positive and Negative
    - 1.c. Town Capital Budget/Board of Education Operating Budget Expenditures Combined Budget, Actual to Date, and Balance
2. Town Purchase Order Number, Vendor Name, Fiscal Year, Purchase Order Amount, and Item Description
    - 2.a. Sample item descriptions to include: Construction documents, Prequalify bidders, Bid and Negotiation, Construction administration, Reimbursable expenses, and Change Orders
    - 2.b. Date, Invoice Number, and Payment

All capital projects are to include a sum for contingency overruns in the amount of 15%.

Reporting
The Superintendent of Schools shall proactively alert the Board of Education if projected expenses of the project are anticipated to exceed the approved amount. The Board of Education will make a determination as to whether to seek a supplemental appropriation from the Town of Westport or utilize its operating budget to fund unanticipated overruns in expenditures.

Regulation adopted:

Westport Public Schools - Capital Project ABC
##-###-RFP

SAMPLE

	TOWN CAPITAL APPROPRIATION			+	BOE OPERATING				=	TOTAL		
	Budget	Actual to Date	Balance		Budget	Actual to Date	FY/ Object Code	Balance		Budget	Actual to Date	Balance
	$ 255,403.50	$ 61,500.00	$ 193,903.50		$ -	$ -		$ -		$ 255,403.50	$ 61,500.00	$ 193,903.50
	100%	24%	76%							100%	24%	76%

Town PO #: XXXXXXXX-00
Vendor: XYZ Architects
Fiscal Year: 2014-2015
PO Amount: $ 4,000.00

Item #	Item description										
1	Architectural services Phase 1	$ 4,000.00	$ 4,000.00	$ -	$ -	$ -		$ -	$ 4,000.00	$ 4,000.00	$ -
		$ 4,000.00	$ 4,000.00	$ -	$ -	$ -		$ -	$ 4,000.00	$ 4,000.00	$ -
		100%	100%	0%					100%	100%	0%

	Date	Invoice #	Payment
1	7/9/2014	12345	$ 4,000.00
			$ 4,000.00

Town PO #: XXXXXXXX-00
Vendor: XYZ Architects
Fiscal Year: 2014-2015
PO Amount: $ 35,390.00

Item #	Item description										
1	Construction documents	$ 17,500.00	$ 17,500.00	$ -	$ -	$ -		$ -	$ 17,500.00	$ 17,500.00	$ -
2	Prequalify bidders	$ 2,000.00	$ 2,000.00	$ -	$ -	$ -		$ -	$ 2,000.00	$ 2,000.00	$ -
3	Bid & negotiation	$ 2,000.00	$ 2,000.00	$ -	$ -	$ -		$ -	$ 2,000.00	$ 2,000.00	$ -
4	Construction administration	$ 11,640.00	$ 3,500.00	$ 8,140.00	$ -	$ -		$ -	$ 11,640.00	$ 3,500.00	$ 8,140.00
5	Reimbursable expenses	$ 750.00	$ -	$ 750.00	$ -	$ -		$ -	$ 750.00	$ -	$ 750.00
6	Change 1 rebid service	$ 1,500.00	$ -	$ 1,500.00	$ -	$ -		$ -	$ 1,500.00	$ -	$ 1,500.00
		$ 35,390.00	$ 25,000.00	$ 10,390.00	$ -	$ -		$ -	$ 35,390.00	$ 25,000.00	$ 10,390.00
		100%	71%	29%					100%	71%	29%

	Date	Invoice #	Payment
1	7/12/2014	12345	$ 10,000.00
1	7/25/2014	67890	$ 7,500.00
2	8/15/2014	11111	$ 2,000.00
3	8/31/2014	22222	$ 1,100.00
3	9/5/2013	33333	$ 900.00
4	9/17/2014	44444	$ 3,500.00
			$ 25,000.00

Town PO #: XXXXXXX-00
Vendor: AAA Construction Company
Fiscal Year: 2014-2015
PO Amount (Orig.): $ 182,700.00
PO Amount (Rev.): $ 182,700.00

Item #	Item description										
1	Base bid	$ 167,000.00	$ 30,000.00	$ 137,000.00	$ -	$ -		$ -	$ 167,000.00	$ 30,000.00	$ 137,000.00
2	Alternate #1	$ 11,200.00	$ 2,500.00	$ 8,700.00	$ -	$ -		$ -	$ 11,200.00	$ 2,500.00	$ 8,700.00
3	Alternate #2	$ 4,500.00	$ -	$ 4,500.00	$ -	$ -		$ -	$ 4,500.00	$ -	$ 4,500.00
		$ 182,700.00	$ 32,500.00	$ 150,200.00	$ -	$ -		$ -	$ 182,700.00	$ 32,500.00	$ 150,200.00

	Date	Invoice #	Payment
	09/15/2014	55555	$ 30,000.00
	09/17/2014	66666	$ 2,500.00
			$ 32,500.00

	Current Contingency:	**$ 33,313.50**			**$ -**				**$ 33,313.50**		
		15%			**0%**				**15%**		

Health Insurance - Consultant Comparative Analysis FY2014 - 2015

	SEGAL PROJECTIONS										LOCKTON PROJECTIONS			
	BUDGET DATA Jan-22-2014	Revised Mar-14-2014	Variance % Jan-to-Mar	Variance $ Jan-to-Mar	Var.	Revised Apr-21-2014	Variance % Jan-to-Apr	Variance $ Jan-to-Apr	Var.	Aug-29-2014	Variance % Jan-to-Aug	Variance $ Jan-to-Aug	Var.
SELF-FUNDED CLAIMS	**$ 14,674,400**	**$ 14,022,200**	**-4.44%**	**$ (652,200)**	**F**	**$ 13,856,400**	**-5.57%**	**$ (818,000)**	**F**	**$ 13,559,975**	**-7.59%**	**$ (1,114,425)**	**F**
Medical	$ 11,699,800	$ 11,156,200	-4.65%	$ (543,600)	F	$ 10,986,200	-6.10%	$ (713,600)	F	$ 10,605,556	-9.35%	$ (1,094,244)	F
Prescription Drug	$ 2,000,100	$ 1,939,700	-3.02%	$ (60,400)	F	$ 1,933,600	-3.32%	$ (66,500)	F	$ 1,960,268	-1.99%	$ (39,832)	F
Dental	$ 974,500	$ 926,300	-4.95%	$ (48,200)	F	$ 936,600	-3.89%	$ (37,900)	F	$ 994,151	2.02%	$ 19,651	U
EXPENSES	**$ 2,871,100**	**$ 2,850,100**	**-0.73%**	**$ (21,000)**	**F**	**$ 2,760,900**	**-3.84%**	**$ (110,200)**	**F**	**$ 2,867,654**	**-0.12%**	**$ (3,446)**	**F**
Contribution to HSA Deductible for Actives	$ 1,298,000	$ 1,291,000	-0.54%	$ (7,000)	F	$ 1,284,000	-1.08%	$ (14,000)	F	$ 1,329,000	2.39%	$ 31,000	U
Medical Administrative	$ 432,800	$ 460,800	6.47%	$ 28,000	U	$ 444,600	2.73%	$ 11,800	U	$ 478,224	10.50%	$ 45,424	U
Network Access Fee	$ 165,100	$ 163,500	-0.97%	$ (1,600)	F	$ 164,600	-0.30%	$ (500)	F	$ 164,426	-0.41%	$ (674)	F
Individual Stop-Loss ($225,000)	$ 756,900	$ 749,700	-0.95%	$ (7,200)	F	$ 682,700	-9.80%	$ (74,200)	F	$ 681,912	-9.91%	$ (74,988)	F
Dental Administrative	$ 46,600	$ 46,100	-1.07%	$ (500)	F	$ 46,300	-0.64%	$ (300)	F	$ 53,903	15.67%	$ 7,303	U
FSA Admin	$ 4,200	$ 2,000	-52.38%	$ (2,200)	F	$ 2,000	-52.38%	$ (2,200)	F	$ 2,931	-30.21%	$ (1,269)	F
Consulting Fee	$ 25,000	$ 25,000	0.00%	$ -	-	$ 25,000	0.00%	$ -	-	$ 45,000	80.00%	$ 20,000	U
ACA Related Fees	$ 117,400	$ 112,000	-4.60%	$ (5,400)	F	$ 111,700	-4.86%	$ (5,700)	F	$ 112,258	-4.38%	$ (5,142)	F
CT Vaccination Assessment	$ 25,100	$ -	-100.00%	$ (25,100)	F	$ -	-100.00%	$ (25,100)	F	$ -	-100.00%	$ (25,100)	F
EMPLOYEE CONTRIBUTIONS	**$ (2,963,200)**	**$ (2,727,500)**	**-7.95%**	**$ 235,700**	**U**	**$ (2,691,300)**	**-9.18%**	**$ 271,900**	**U**	**$ (2,972,344)**	**0.31%**	**$ (9,144)**	**F**
Actives	$ (2,366,500)	$ (2,246,100)	-5.09%	$ 120,400	U	$ (2,218,000)	-6.28%	$ 148,500	U	$ (2,433,811)	2.84%	$ (67,311)	F
COBRA Participants	$ (7,900)	$ (11,700)	48.10%	$ (3,800)	F	$ (11,500)	45.57%	$ (3,600)	F	$ (26,008)	229.22%	$ (18,108)	F
Retirees under 65 (including TRB)	$ (588,800)	$ (469,700)	-20.23%	$ 119,100	U	$ (461,800)	-21.57%	$ 127,000	U	$ (512,525)	-12.95%	$ 76,275	U
SUBTOTAL COST	**$ 14,582,300**	**$ 14,144,800**	**-3.00%**	**$ (437,500)**	**F**	**$ 13,926,000**	**-4.50%**	**$ (656,300)**	**F**	**$ 13,455,285**	**-7.73%**	**$ (1,127,015)**	**F**
Claims Fluctuation Margin (CFM)	$ 733,700	$ 701,100	-4.44%	$ (32,600)	F	$ 692,800	-5.57%	$ (40,900)	F	$ -	-100.00%	$ (733,700)	F
SUBTOTAL COST PLUS MARGIN	**$ 15,316,000**	**$ 14,845,900**	**-3.07%**	**$ (470,100)**	**F**	**$ 14,618,800**	**-4.55%**	**$ (697,200)**	**F**	**$ 13,455,285**	**-12.15%**	**$ (1,860,715)**	**F**
Budget changes made by Administration:													
Est. BOE subsidy for Retirees over 65 Parts A & B	$ 200,000									$ 253,153	26.58%	$ 53,153	U
Est. of other funds contribution	$ (85,000)									$ (85,000)	0.00%	$ -	-
Proposed BOE Current Services	**$ 15,431,000**									**$ 13,623,438**	-11.71%	$ (1,807,562)	F
Est. increase due to enrollment positions	$ 79,200									$ 79,200	0.00%	$ -	-
Est. increase due to Change to Programs	$ 108,000									$ 108,000	0.00%	$ -	-
BOE Proposed Account 210 appropriation	**$ 15,618,200**									**$ 13,810,638**	-11.57%	$ (1,807,562)	F
Budget changes made BOE (final adoption):													
Do not fund recommended CFM	$ (733,700)											$ 733,700	
Revised down health claims projection	$ (382,800)											$ 382,800	
BOE Adopted Account 210 appropriation	**$ 14,501,700**											**$ (691,062)**	**F**

Medical Health Insurance Fund
FY 14-15 Projections
Claim data as of August 31, 2014

	Estimates
Cash receipts	
General Fund Budget from line 210	$ 14,501,700
Other Fund Contributions	85,000
Employee Contributions (Active)	2,433,811
Flex Spending Accounts	-
Cobra Participants	26,008
Retirees under 65	365,701
State Teachers Retirement (TRB)	146,824
Life Insurance Premiums	25,000
Retirees over 65	421,847
Other Contributions (FMLA, Retiree Life, etc.)	-
Total cash receipts	**18,005,891**
Cash disbursements	
Medical	10,751,572
Prescription	1,988,348
Dental	1,007,255
Flex Spending Accounts	-
Contribution to HSA	1,329,000
Medical Adminsitrative	478,224
Network Access Fee	164,426
Individual Stop-Loss	681,912
Dental Adminsitrative	53,903
FSA Administrative	2,931
Consulting Fee	45,000
ERIP & Refunds Less Reimbursements	-
ACA Related Fees	112,258
Retirees over 65	675,000
Total cash disbursements	**17,289,829**
Change in cash balance	**716,062**
Beginning cash balance (unaudited)	**930,839**
Ending cash balance(deficit)-projection	**1,646,901**
Less: Incurred but not reported claims (carrying FY14)	(908,233)
Net Position(Deficit) end of year-projection	**738,668**

Claims Cash Draw Against Insurance Fund Account

	Medical/Rx	Dental	Flex	Total	Avg. Monthly Claims	Variance
Jul 2014	$ 940,672	$ 94,171	$ 6,419	$ 1,041,262	$ 1,041,262	
Aug 2014	$ 1,551,384	$ 93,150	$ 396	$ 1,644,930	$ 1,343,096	$ 301,834
Sept 2014				$ -		
Oct 2014				$ -		
Nov 2014				$ -		
Dec 2014				$ -		
Jan 2015				$ -		
Feb 2015				$ -		
Mar 2015				$ -		
Apr 2015				$ -		
May 2015				$ -		
Jun 2015				$ -		
	$ 2,492,056	$ 187,321	$ 6,815	$ 2,686,192		
YTD/Estimate	19.6%	18.6%	n/a			
Theoretical YTD Spend Rate	16.7%	16.7%	n/a			
variance	2.9%	1.9%				

WESTPORT PUBLIC SCHOOLS

ELLIOTT LANDON
Superintendent of Schools

110 MYRTLE AVENUE
WESTPORT, CONNECTICUT 06880
TELEPHONE: (203) 341-1010
FAX: (203) 341-1029

To: Members of the Board of Education

From: Elliott Landon

Subject: Proposed BOE Meeting Dates: July 1, 2015-June 30, 2016

Date: September 22, 2014

The Board of Education is required to file with the Town Clerk an annual schedule of meeting dates. In recent years, the Board has elected to address this requirement by posting its annual schedule of meetings on a "school year," rather than a "calendar year," basis. Therefore, consistent with the Board's previous actions, I have prepared for your review a calendar that lists proposed Board meeting dates from July 1, 2015 through June 30, 2016.

While we attempt to schedule regular Board meetings on the second and fourth Mondays of each month, it is not always possible to adhere to that timeline. Thus, it is recommended that Board members reserve all Mondays in the event special meetings, other than scheduled ones, may be required throughout the year.

You should note that building principals are directed not to schedule special functions on Monday nights to avoid conflicts for Board members, staff and parents.

The calendar appended to this memorandum is being presented to the Board for your review and approval at the meeting of September 22.

ADMINISTRATIVE RECOMMENDATION

Be It Resolved, That upon the recommendation of the Superintendent of Schools, the Board of Education adopts a calendar of scheduled public meetings for the period July 1, 2015-June 30, 2016.

L:\BOEMeetingCalendar.Sept 22 2014.doc

WESTPORT PUBLIC SCHOOLS
PROPOSED BOARD OF EDUCATION -- MEETING CALENDAR JULY 2015- JUNE 2016

JANUARY 2015 (18)

S	M	T	W	T	F	S
				1	2	3
4	5	6	**7	8	9	10
11	12	13	14	15	*16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

** All Day Budget Work Session

DATES APPROVED AT BOE MTG Dec. 2,2013

1 New Years Day
2 Holiday Recess
*16 Staff Development Day
No School Students
19 Martin Luther King Day

FEBRUARY 2015 (14)

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	*23	24	25	26	27	28

16 Presidents' Day
16-20 Winter Recess
*23 Staff Development Day
No School Students

MARCH 2015 (22)

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

APRIL 2015 (16)

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

3 Good Friday
13-17 Spring Recess

MAY 2015 (20)

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

25 Memorial Day

JUNE 2015 (10)

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

19 Students'/Teachers' Last Day
Shortened Day for Students Only

PROPOSED 2015-16 BOE MEETING DATES

JULY 2015

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	31	

4 Independence Day

AUGUST 2015 (3)

S	M	T	W	T	F	S
						1
2	3	4	5	6	7	8
9	10	11	12	13	14	15
16	17	18	19	20	21	22
23	*24	*25	*26	(27)	28	29
30	31					

*24, *25, *26 Staff Development Days
(27) Student's First Day

SEPTEMBER 2015 (19)

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30			

7 Labor Day
14 Rosh Hashanah
23 Yom Kippur

OCTOBER 2015 (22)

S	M	T	W	T	F	S
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

NOVEMBER 2015 (18)

S	M	T	W	T	F	S
1	2	*3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30					

3 Election Day/*Staff Dev. Day
No School Students
25 Shortened Day
26-27 Thanksgiving Day

DECEMBER 2015 (17)

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

23 Shortened Day
24-31 Holiday Recess

JANUARY 2016 (18)

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	*15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30
31						

1 New Year's Day
*15 Staff Development Day
No School Students
18 Martin Luther King Day

FEBRUARY 2016 (15)

S	M	T	W	T	F	S
	1	2	3	4	5	6
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	*22	23	24	25	26	27
28	29					

15 Presidents' Day
15-19 Winter Recess
*22 Staff Development Day
No School Students

MARCH 2016 (22)

S	M	T	W	T	F	S
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

25 Good Friday

APRIL 2016 (16)

S	M	T	W	T	F	S
					1	2
3	4	5	6	7	8	9
10	11	12	13	14	15	16
17	18	19	20	21	22	23
24	25	26	27	28	29	30

18-22 Spring Recess

MAY 2016 (21)

S	M	T	W	T	F	S
1	2	3	4	5	6	7
8	9	10	11	12	13	14
15	16	17	18	19	20	21
22	23	24	25	26	27	28
29	30	31				

30 Memorial Day

JUNE 2016 (11)

S	M	T	W	T	F	S
			1	2	3	4
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30		

22 Students' Last Day/Graduation
Shortened Day for Students Only

= Proposed Board Meeting Dates

WESTPORT PUBLIC SCHOOLS

ELLIOTT LANDON
Superintendent of Schools

110 MYRTLE AVENUE
WESTPORT, CONNECTICUT 06880
TELEPHONE: (203) 341-1010
FAX: (203) 341-1029

To: Members of the Board of Education

From: Elliott Landon

Subject: Appropriation Returns to Town of Westport, FYE 2013 and 2014

Date: September 22, 2014

As Mr. Longo prepared the end-of-year financial report for FYE 2014, he identified a fund balance of $3,896.67 in the Board of Education's operating budget for the period July 1, 2013-June 30, 2014.

For FYE 2013, Mr. Longo has found an additional fund balance of $24,097.75 in the 2012-13 operating budget covering the period July 1, 2012-June 30, 2013.

All of these funds will be returned to the General Fund of the Town of Westport as a matter of good fiscal management and attentiveness to fiscal responsibility. A Resolution has been prepared for the Board of Education approval to formalize the return of these funds to the Town of Westport.

ADMINISTRATIVE RECOMMENDATION

Be It Resolved, That upon the recommendation of the Superintendent of Schools, the Board of Education authorizes the return of the sum of $27,994.42 to the General Fund of the Town of Westport, representing Board of Education operating fund balances for the period July 1, 2012-June 30, 2014 in the amounts of $24,097.75 and $3,896.67, respectively.