

JOIN EUROPORTFOLIO

EPortfolio 2003

Europortfolio is the name of the *European Consortium for the ePortfolio*, which was constituted following the ePortfolio 2003 conference held in Poitiers, France on 9 and 10 October 2003. 130 delegates representing 22 countries participated in the conference, providing lively testimony to the fact that the ePortfolio represents one of the most significant manifestations of how we shall be learning and developing in a knowledge economy and society.

The conference made it clear that, far from being a simple 'paperless' portfolio, the ePortfolio opens new learning horizons. Schools, universities, professional associations, cities and countries are providing ePortfolio services to their pupils, students, workers and lifelong learners. Wales is providing an ePortfolio to 3 millions citizens, while the UK's Royal College of Nursing, the largest European Professional association, with 350,000 members, has chosen to use the ePortfolio for the continuing professional development and re-accreditation of nurses. Students in the Netherlands, Sweden, Finland, Norway and Italy are also using ePortfolios.

While the conference acknowledged the increasing number and scope of ePortfolio and ePortfolio-related initiatives it also clearly established the need for greater co-ordination at international level. When pupils move to work or university; workers move from one employer or one country to another; professionals report to different professional associations and lifelong learners move from one learning community to another, it is critical that they can keep the same ePortfolio. It is also vital that other pupils, students, citizens, colleagues, peers, employers (current or future) can have access to the part(s) of our portfolio that we have decided to share with others – to work together, gain a new qualification through accreditation of prior learning or experience, create a community of practice, find a new job, etc.

The worldwide emergence of the ePortfolio is transforming our current views on learning technologies. For the first time in the relatively short history of learning technologies we see the rise of a technology dedicated to valuing and celebrating the achievements of the individual, from nursery school to lifelong and life wide learning, a technology providing a key link for individual learning, organisational learning and territorial learning (learning regions and cities). While some countries and regions are already providing the infrastructure required to offer ePortfolio access to all citizens, other regions and countries are considering it, and others have yet to discover its possibilities.

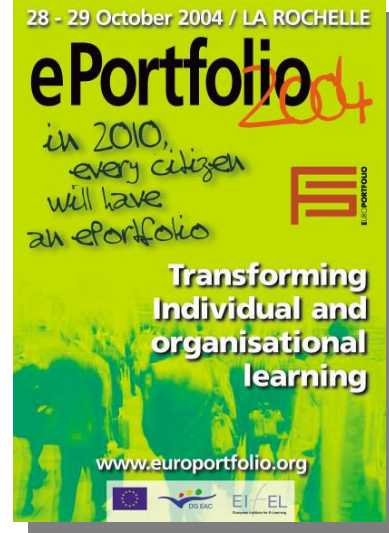
In order to provide the means for the ePortfolio to achieve its highest potential in Europe, *Europortfolio* will promote innovative practice and technology, and encourage the adoption of technical standards that will enable interoperability, between various ePortfolio systems (centralised or networked), and between ePortfolio systems and other information systems. Interoperability will be the key to maximising the number and quality of services offered to ePortfolio owners.

Mission

The mission of Europortfolio is to:

- **Promote innovative practice and technology** – use of the ePortfolio as one of the foundations of a learning economy and society, a link between the different dimensions of learning: individuals, organisations, communities, territories (learning cities and regions) and society, the lifelong and life wide repository and celebration of one's achievements.
- **Contribute to the definition of technical standards** - ensuring interoperability between ePortfolio and ePortfolio-related initiatives.
- **Establish a reference platform** implementing state of the art standards in order to provide a benchmark and a test facility.
- **Update current occupational standards of competence** to promote the use of ePortfolios as a foundation for forward-looking practice in the field of education, training, human resource management and development.
- **Provide support to, and co-ordinate,** European initiatives with other national and international initiatives, sector-specific or cross-sector; facilitate the exchange of information among all the stakeholders involved in ePortfolio and ePortfolio-related initiatives; encourage European and international co-operation
- Mobilise the human, financial, operational and technical **resources** required to achieve its mission and create the conditions for a self-sustainable consortium

In order to achieve its mission, Europortfolio is established as a consortium of partners representing key stakeholders, from schools to lifelong and life wide learning, from publishers of learning technologies to policy makers. This consortium will work in close relation with standardisation bodies such as CEN/ISSS.



Europortfolio is committed to Open Standards. The outcomes of the Consortium will be accessible under Creative Commons licence to organisations that wish to use Europortfolio standards to provide open, free or commercial platforms.

Europortfolio will also encourage national, regional, thematic and sectoral interest groups, as it is critical that the Consortium’s activities reflect the diversity of culture, language and interests, and are widely accessible in different languages.

International consortia as well as consortia outside of Europe will be regularly invited to contribute to the different activities/structures of Europortfolio.

Steering Committee

The initial structure of Europortfolio is designed to offer maximum flexibility and optimise the results provided to its Members.

For an initial two-year period, the Consortium will be led by a Steering Committee led by Founding Members. Additional members will join the Steering Committee, along with the development of the Consortium

The Founding Members are national and European membership organisations that have agreed to contribute significant resources to the Consortium. The initial Founding Members are the membership organisations that are the partners of EPICC (European Portfolio Initiatives Coordination Committee), a European project supported by the European Commission whose mission is to develop ePortfolio interoperability standards.

In this way, founding members will provide the momentum required to launch the Consortium, while allowing everyone to influence its future development and constitution.

Structure

The development of the *Consortium* is planned in two phases:

1. **Launch:** for a period of 24 months, *Europortfolio* will operate as a consortium of partners under the responsibility of a Steering Committee
2. **Consolidation:** at the end of this initial period, the members of the consortium will consider whether the creation of a proper legal structure is required and the form of its constitution

Initially, *Europortfolio* will therefore operate as a consortium of partners linked by a consortium agreement.

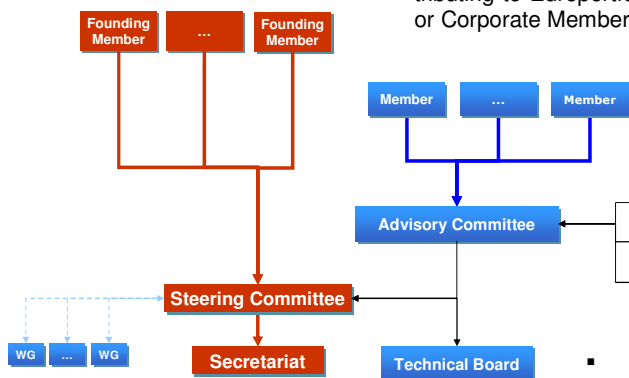
The Steering Committee will control and monitor the management of *Europortfolio* and define the orientation of its policies. Before the first General Assembly, which will be held by the end of the initial two year period¹, it has the power to nominate new Steering Committee delegates among the Members,

Europortfolio will also eventually include:

- **An Advisory Committee** to identify the needs of, and disseminate the results to, regional, national, European and international networks, other national or international ePortfolio consortia (several consortia already exist outside of Europe).
- **A Technical Board** to coordinate all technical activities, profile existing specifications and standards, and set up and monitor operations of the Europortfolio workgroups and pilot programmes.
- **Working Groups, Special Interest Groups and National Committees** to facilitate the identification of needs and dissemination of *Europortfolio* outcomes at a national, regional or sectoral level.

Who can be a Member?

Europortfolio Members are organisations, public, private and voluntary. Although only organisations can join Europortfolio, individuals who are interested in contributing to Europortfolio may do so by joining one of the Europortfolio Founding or Corporate Members.



What are the Benefits

Europortfolio Corporate Members may:

- have full access to the ***Europortfolio*** knowledge base: standards, draft standards, working papers, etc.
- use and implement the outcomes of ***Europortfolio*** activities, in their own organisation and products and services
- contribute to and orientate the activities and work in progress on standards and standards-related issues
- contribute to the strategic direction of ***Europortfolio*** and influence future developments

¹ One of the missions of the Steering Committee will be to draft a constitution of the Consortium

- elect representatives to the **Europortfolio** Steering Committee and Technical Board
- receive full recognition for their involvement in all **Europortfolio** publications, activities, and presentations related to the public release and dissemination of **Europortfolio** activities and documents
- register their staff on the **Europortfolio** developers network
- collaborate actively with **Europortfolio** staff and Members in co-marketing opportunities, press releases, tradeshow participation, and other high-visibility public events that are mutually beneficial
- use the logo **Europortfolio Member** for their own marketing

Europortfolio Workplan

The main items on the Europortfolio agenda (more details in the annexe) are:

- **Standards:** definition of ePortfolio application profiles for different communities: schools, higher education, lifelong learning, sector specific (medicine, engineering, etc.);
- **Tools:** identification of all ePortfolio tools and technologies; promote pilots with existing tools; provide a demonstration and reference platform;
- **Practice:** identification of all ePortfolio and ePortfolio-related initiatives at local, regional, national and international level; identification the need for new individual and organisational competencies;
- **Policies:** identification of forward looking policies at national, regional and local levels; cross-sector and sector specific; publication of white papers.

Under certain conditions a Corporate Member that is a Membership organisation, and which has made a significant financial contribution to the Consortium, can offer to its members the status of **Associate Members**. This status will provide access to certain services (c.f. next table). They will:

- have early access to the **Europortfolio** draft specifications and documents
- contribute to pilot projects and trials based on beta version of standards
- register their staff in the developers network
- network with other ePortfolio professionals

Membership Fees

In order to achieve its goal, the consortium needs to collect sufficient resources. The resources will come principally from membership fees:

- National or regional authorities: 10,000 €.
- Organisations with a turnover greater or equal to 5 million €: 5,000 €, others 1,500 €.
- Members of Consortium Members are eligible to become associate members of the Consortium. Discounts (up to 50%) are available to upgrade to Corporate membership from Associate membership.
- In-kind contributions are not accepted in lieu of membership fees.
- A member may resign from membership of **Europortfolio** at any time. No refunds of prior investments will be made in such cases. Only members in good standing will be able to use the services provided by the consortium

Any questions or requests for clarification about membership fees should be directed to Serge Ravet: serge.ravet@eife-l.org.

Members	Who?	Steering Committee	Technical Board	Marketing Affiliation	Work Groups	Knowledge Base	Pilot Programmes	Developers Network	Membership Fees
Corporate	Any organisation, public, private or voluntary, networks, membership organisations.	Yes	Yes	Yes	Yes	Yes	Yes	Yes	Public authorities: 10,000 € turnover > 5 million €: 5,000 € turnover < 5 million €: 1,500 €
Associate	Any organisation, member of a Corporate Member Organisation	No	No	No	Part	Part	Part	No	Free, if your organisation belongs to a Founding or Corporate Member

Key Issues for Europortfolio Members

What are the different ePortfolios and ePortfolio-related models?²

- How similar/different are ePortfolios when used at school, at university or at work? Are they used as:
 - An extended CV?
 - A tool for reflecting on one's own practice/learning?
 - A tool for planning one's own professional development?
 - A personal knowledge management tool?
- A piece of a giant jigsaw used for implementing organisational learning systems (knowledge management)?
- How different are they from paper-based portfolios?

What are learning and teaching/training issues associated with ePortfolios?

- What are the unique features of ePortfolios over paper-based portfolios, and how do they contribute to better learning and learning management?
- What are the pedagogical benefits of an ePortfolio?
- What curriculum strategies for implementing ePortfolios effectively?
- What pedagogical strategies to maximise the benefits of ePortfolios?
- What is the impact of the ePortfolio format (free or standardised) on the learning outcomes?
- What is the impact of the integration of the ePortfolio in the organisation's information system on the quality of the learning management?
- In an educational/training setting, are ePortfolios for learners only, or should it be for all the staff (teachers, trainers, assistants, managers, etc.)?
- How can ePortfolios be effective in generating, recording, and assessing learning?
- How can ePortfolios contribute to both formative and summative assessment?
- How can ePortfolios contribute to building individualised learning experiences, taking into account learning styles?
- How can ePortfolios contribute to equal access to learning?
- How can ePortfolios be used to plan and integrate lifelong learning experiences?
- How can ePortfolios contribute to professional development and organisational learning?
- How do we document and assess the impact of ePortfolios on individual and organisational learning?
- How can ePortfolios contribute to ensuring equal access to learning?

What are the ethical, security, access and privacy issues associated with ePortfolios?

- How do we maintain the required levels of privacy on personal data? Who can see what, when, for how long?
- How do we help learners make informed choices about the self-disclosure enabled by ePortfolios?
- How do we enforce an ethical use of data collected? Who is in charge of defining and implementing the short- and long-term policy related to those issues at the organisational and political levels

- How do we ensure the validity of the information contained in ePortfolio (e.g. certificates)?
- Should organisations need institutional gatekeepers?

What are the education and training systems issues associated with ePortfolios?

- What are the values and the rationale for implementing an ePortfolio policy?
- What set of potential purposes are there for ePortfolios? Getting rid of paper or changing the learning and accreditation policy?
- What characteristics are appropriate for each purpose?
- What are the key challenges faced by organisations in implementing ePortfolios? Staff competences, process reengineering, etc.?
- What are the implications of a potential shift from institutionally based to lifelong learner based records?
- In what ways do institutional portfolios contribute to an institution's development and record its mission and outcomes?

What are the institutional planning, implementation, and programmatic issues associated with ePortfolios?

- How, as an organisation can I maximise the use of ePortfolio to implement organisational learning?
- How, as an authority in charge of a district or a region can I implement ePortfolio initiatives and how can I measure the impact of the policies in education and training?
- What are the institutional policy implications (e.g., intellectual property, document confidentiality, etc.)?
- What are the support and long-term maintenance implications (financial models, storage and archiving, lifelong portfolios)?
- How can we use our understanding of prior efforts to avoid some of the pitfalls?
- How can education and training institutions collaborate with each other and with government and industry to address ePortfolio challenges?

What are the technical issues associated with ePortfolios?

- How can existing technologies be used to design effective ePortfolios?
- How can ePortfolios be integrated into existing enterprise resource planning systems, HR systems, learning and content management systems (ERP, HRIS, LMS, CMS)?
- What kind of new technology is required to improve the benefits of ePortfolios?
- How can an individual keep the same portfolio from school to lifelong learning, through university, moving countries and companies?
- Should ePortfolios be centralised on a server, on a peer-to-peer or stand alone (e.g. CD-ROM) system?
- What kind of services should be provided using the information contained in the ePortfolio?
- What are the standards and technical specification issues?

What are the marketplace issues associated with ePortfolios?

- How, as a publisher of learning systems and resources, can I ensure that the provision is compliant with existing and future standards? How can I provide flexibility while providing quality services to the users?
- How, as a buyer of learning system and resources, can I ensure that I make the right investment and the right compromise between the need for standards and innovation?
 - How can buyers influence vendors to meet their institutional need

² Please note that this list has been adapted and extended on the basis of the Educause / National Learning Infrastructure Initiative list www.educause.edu/nlii/keythemes/eportfolios.asp