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### The Educational Developer's Portfolio

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Jeanette McDonald, Natasha Kenny, Erika Kustra, Debra Dawson, Isabeau Iqbal, Paola Borin, and Judy Chan

# The Educational Developer's Portfolio



**EDC RFPES**

Educational Developers Caucus  
le Réseau de formateurs en pédagogie  
de l'enseignement supérieur

Jeanette McDonald  
Natasha Kenny  
Erika Kustra  
Debra Dawson  
Isabeau Iqbal  
Paola Borin  
Judy Chan

Coordinating Author:  
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# EDC RFPES

Educational Developers Caucus  
le Réseau de formateurs en pédagogie  
de l'enseignement supérieur

## Educational Developers Caucus

As a community of practice, the Educational Developers Caucus (EDC) engages individuals in educational development across Canada to network, to share resources, to collaborate on key issues through action groups, and to connect through professional development opportunities. Since the initial working group in 2001 and the establishment of EDC within the Society for Teaching and Learning in Higher Education in 2003, our community has grown. Reflecting our continuing evolution, our Living Plan is regularly renewed by our community to describe the evolving practices and needs throughout our community providing a framework for aligning our professional development initiatives including grants, conferences, institutes, action groups, and webinars.

### Our initiatives reflect our values of:

**Open community** - We welcome all persons who share an interest in educational development work. We seek and value diverse perspectives on this work and the individual backgrounds, expertise, and wisdom Education Development professionals bring to our community.

**Collaboration** - We encourage freely sharing our collective knowledge about educational development and related topics for our mutual benefit. We support a collaborative and peer-facilitated model of professional development for our members at all career stages.



**Ethical practice** - We demonstrate integrity and transparency in all our interactions. We uphold the highest possible values in collegial scholarship, crediting others for their contributions, and undertaking all work according to accepted ethical practices and policies.

**Scholarly approach** - We take a scholarly approach to our work, drawing on a variety of resources and contributing to that knowledge through our own scholarly inquiry. We embody multiple approaches to scholarship and its sharing so others can benefit from our work.

## About the Educational Development Guide Series

The Educational Development (ED) Guide Series offers in depth, open, scholarly, collaborative, and practical resources for new to experienced educational developers.

With the aim of embodying and furthering evidence-informed reflective practice in educational development, ED Guides are expected to

- Provide a practical and applied resource for educational development practice;
- Draw on established literature and/or research, in addition to lived practice;
- Reflect diverse contexts and perspectives within educational development;
- Achieve high quality writing through constructive peer-review; and
- Draw on the richness of our community by inviting contributions or collaboration from EDC action groups, ED colleagues, and/or others in response to a call for expressions of interest or initial conference sessions.

Further details of our ED Guides planning and creation process can be found online.

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As an education developer at the University of British Columbia's Centre for Teaching, Learning and Technology, Judy Chan develops programs to connect faculty members, post-doctoral fellows, and staff so that they can share innovative and inspiring teaching practices. Outside of the Centre, Judy explores food chemistry and safety with her students in an introductory food science course, where she gets to interact with students and learn how they learn.



# Acknowledgments

The creation of *The Educational Developer's Portfolio* guide owes its thanks to many individuals across the Canadian educational development community, in particular the EDC executive. Below we have highlighted certain individuals who have played an instrumental role in the guide's development.

Since the idea of a guide series was first considered by the EDC executive members (past and present), they have been supportive of its development. In particular we would like to recognize

- their endorsement of the two action groups focused on portfolio development: one chaired by Ruth Rodgers (now retired), and one chaired by Jeanette McDonald (refer to [Chapter 1](#));
- funding in support of creating the guide series and copy editing for each issue;
- the direction and coordinating support of Carolyn Hoessler, Vice Chair: Professional Development, who has and continues to shepherd the development of the guide series;
- past and current EDC Chairs Nicola Simmons and Debra Dawson for their ongoing commitment to the guide project; and
- the EDC executive and the EDC community for affirming the portfolio's potential role and value as a professional development tool for educational developers through the Living Plan document and the curriculum of our EDC Institutes.

The guide underwent many rounds of review during its creation. In addition to the authorship team and our colleagues who took part in the blind review process coordinated by the Vice Chair: Professional Development, the guide was also reviewed by Lynn Taylor, Stephanie Dimech, Theresa Matus, and Celia Popovic. Thank you all for your feedback.

In parallel with our efforts to develop a portfolio guide, members of the portfolio action group researched different options and approaches for an EDC guide series. Marla Arbach, in particular, a former action group member, played a leadership role in this capacity. Thank you Marla.

A special thanks goes to Alan Wright for authoring the guide's Foreword, providing historical context for the educational developer's portfolio since and before he published his seminal piece on educational developer portfolios with co-author Judith Miller (Wright & Miller, 2000).

For [Chapter 3](#), the guide authors would like to acknowledge the contributions of Julie Timmermans for her work on threshold concepts in that chapter; Ruth Rodgers and the 2012 participants of the EDC Institute in Halifax, Nova Scotia for their work on the pathways to development competencies; the educational developers of the Taylor Institute for Teaching and Learning for their feedback on the survey instruments found in the appendix section of the guide, and the valuable input that came from conversations with developers from across Canada. A special thanks goes to Alice Cassidy, Nicola Simmons, Joy Mighty, Teresa Dawson and Judy Britnell.

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The guide authors would also like to acknowledge Julie Timmermans and Trevor Holmes for their early work on developing an educational developer's portfolio. Tools and resources they created can be found online at the following website - <http://eddossierproject.wikispaces.com/>

Lastly, the chapter authors would like to recognize and thank Jeanette McDonald for her work as the educational developer's portfolio action group chair and coordinating author of the guide.





# Foreword

## By W. Alan Wright

Educational developers in Canada and abroad will welcome this excellent, timely guide to the developer's portfolio. This comprehensive monograph takes the reader on a stimulating journey from portfolio concept to final document with remarkable clarity, breadth, and depth. What is more, this publication successfully draws upon the relevant scholarly literature yet provides much practical advice for the portfolio developer in need of guidance at every step of the conceptualization and writing process.

Allow me to lend historical perspective to this groundbreaking guide to the educational developer's portfolio. I can trace the journey leading to the appearance of this guide back to the day when the Canadian Association of University Teachers (CAUT) commissioned a small group of faculty to create and publish a guide to the teaching dossier (Shore et al., 1986) in order to support their members' claims to achievements in teaching. The teaching dossier/dossier d'enseignement—or portfolio as it is called in some jurisdictions—eventually became an internationally-recognized means of recording one's profile and narrative as a teacher in higher education.

In 1990, soon after I was appointed director of the new centre for teaching and learning at Dalhousie University in Nova Scotia, a need to better document teaching was identified on campus. Senior academic administrators found the wagon-loads of raw data accompanying faculty files for tenure and promotion provided little true insight into the concrete contributions to teaching of academic staff. Our centre subsequently launched a sustained effort to introduce the teaching portfolio concept on campus and created *Recording Teaching Accomplishment: A Dalhousie Guide to the Teaching Dossier* (O'Neil & Wright, 1991). The guide was purchased in bulk by dozens of colleges and universities throughout Canada and the United States.

Interest in the teaching portfolio concept grew rapidly during that period as the American Association for Higher Education (AAHE) published *The Teaching Portfolio: Capturing the Scholarship in Teaching* (1991) and *Campus Use of the Teaching Portfolio: Twenty-Five Profiles* (1993). Descriptions of developments at Dalhousie University appeared in both AAHE monographs, and York University was included in the second publication. Peter Seldin of Pace University put together a "Practical Guide" to the teaching portfolio (1991) and a description of "Successful Use" of the portfolio (1993). Dalhousie was featured alongside eight U.S. colleges and universities in these publications. Seldin became a self-described Johnny Appleseed of the portfolio in the United States as the demand for workshops swept the country. Colleges and universities in every Canadian province extended invitations to me to facilitate workshops, in French as well as in English, within a few years. By 1995 the teaching dossier was ranked more highly for its "potential to improve the quality of teaching" than many summative tools such as student ratings of instruction and administrative class observations, in an international survey of educational developers in over 300 universities (Wright & O'Neil, 1995, p. 12).

During a 1999 sabbatical in Worcester, Massachusetts, I had the pleasure of mentoring faculty at many of the area's two-year colleges and universities. It was then that I realized, together with my host Judy Miller, that educational developers coaching faculty in portfolio development might adapt the portfolio concept to better record the activities, approaches, accomplishments, and aims in their own professional work. Our collaboration led to one of the early published papers on the educational developer's portfolio (see Wright & Miller, 2000).

Educational change often occurs on a broken front, and the educational development community did not prioritize the adoption and development of the evolving notion of the educational developer's portfolio in the early years of this century. This time lag can be closely linked to a certain lack of readiness to articulate the salient dimensions of educational development as a profession. Central to a roundtable I led at the 2005 annual conference of the POD Network in Milwaukee was the question: "Professionalizing educational development: By design or by default?" The process of professionalization is a journey, a long and winding road, and our eventual collective readiness to embrace the concept, and the practice of the educational developer's portfolio, is an indicator of the maturation of the profession. The community has made significant progress in the articulation of the educational developer's roles as well as the development of a vision for the profession.

The publication of *The Educational Developer's Portfolio* marks a milestone in the professionalization of the educational developer in Canada and beyond. It draws on the scholarly research, which has emerged since the turn of the century, to produce a highly credible publication. It also draws on the collective experience and judgement of the increasingly active and cohesive Educational Developers Caucus (EDC) of the Society for Teaching and Learning in Higher Education (STLHE). This guide reflects an evolving consciousness of the fundamental roles and responsibilities germane to those who wear the educational developer title with pride. It helps to define the nature of our collective work and provides advice to those individual educational developers who seek to articulate their particular profiles.

Bonne lecture!

W. Alan Wright, PhD

Vice-Provost, Teaching and Learning

University of Windsor

January, 2016


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# Chapter 1

## Setting the Stage for the guide and the Educational Developer's Portfolio



This opening chapter sets the stage for the educational developer's portfolio and the guide, beginning with a brief overview and perspective of educational development in Canada today. The remaining two sections (a) situate how the guide, and the action group who authored it, came to be, and (b) identify the intended audience, design, and suggested use of the guide.



## Educational Development: An Evolving Landscape

### “The Times They Are A-Changin’”

Bob Dylan’s (1964) song and album title noted above aptly capture the experience of educational (also called academic and faculty) development in Canada and across the globe – dynamic, growing, anticipative, exciting, and multifaceted. “Dedicated to helping colleges and universities function effectively as teaching and learning communities” (Felten, Kalish, Pingree, & Plank, 2007), more people than ever before are entering the field, choosing to make educational development their career of choice. This growth is documented in the literature (Gibbs, 2013; Sorcinelli, Austin, Eddy, & Beach, 2006); it is also evident, for example, at conferences of the Educational Developers Caucus (EDC) of Canada, where the average number of new and first-time participants attending (e.g., 2013–2015 inclusive) represents more than one third of all those registered (C. Popovic, personal communication, September 14, 2015).

Not only is the Canadian educational development scene growing and its practitioner base diverse both in make-up (Weimer, 1990) and in pathways to the profession (McDonald, 2011; McDonald & Stockley, 2010), but the career spectrum of the field is also expanding. For example, there are more specialized positions available to educational developers that are discipline-specific, technology-oriented, curriculum-centred, and instructional design in focus (Gibbs, 2013). A new category of educational developer at the senior administrative level has emerged as well, that of associate vice president (or provost) teaching and learning (Grabove et al., 2012). With the addition of these new position types and the establishment of new and long-serving teaching and learning centres in post-secondary institutions (Grabove et al., 2012), there is greater career mobility between colleges and universities and across the ranks. We see evidence of this mobility by way of weekly, if not daily, job postings on professional association email listservs and/or career fairs at educational development and teaching and learning type conferences such as the Society for Teaching and Learning in Higher Education (STLHE) in Canada and the Professional and Organizational Development (POD) Network in the United States.

Developer scope of practice is also more diverse, complex, and ethically-laden (Knight & Wilcox, 1998). No longer an informal set of instructional improvement activities aimed at individuals alone (Boice, 1989), educational development practitioners work more broadly at the group (e.g., department), institutional, and sector-wide levels (i.e., higher education) (Fraser, Gosling, & Sorcinelli, 2010). As sources of expertise in teaching, student learning and development, and change management to name a few, educational developers play an instrumental role, working alongside librarians, academic support staff, and others to support the “academic development project” (Clegg, 2009, p. 409) and to meet the mounting needs of post-secondary institutions (Diamond, 2005). They do so in a myriad of ways and through a variety of approaches, such as:

- creating and facilitating development opportunities (e.g., instructional, curricular, and technological);
- designing and producing educational resources (e.g., print and media-based);
- collaborating and consulting on special projects and policy development initiatives;
- advocating for, leading, or facilitating institutional change;
- brokering relationships and opportunities for partnership; and
- contributing directly or indirectly to the scholarship of teaching and learning and educational development.

In the broadest sense, educational developers “create conditions supportive of teaching and learning” (Leibowitz, 2014, p. 359).

At centre and sector levels, we see evidence of change as well. Teaching and learning units are becoming more central to the academic missions of post-secondary institutions, and the field of educational development is establishing itself more firmly within the landscape of higher education (Dawson, Mighty, & Britnell, 2010b; Kahn & Baume, 2003; Saroyan & Frenay, 2010; Schroeder, 2011).

These exciting and often challenging times signal how far we have come since the opening of the first Canadian teaching and learning centre at McGill University in 1968 (Survey of Provision for Academic Development Staff, 1980). The times also point to the need for a tool to aid educational developers in documenting, reflecting upon, and evaluating the effectiveness and impact of their

educational development practice; bridging disciplinary, centre, and institutional contexts; tracing career paths over time; and assessing ongoing professional development needs. That tool is the educational developer's portfolio (Stanley, 2001; Wright & Miller, 2000), the subject of this guide, and the first in a series of guides sponsored by the EDC on issues and topics germane to educational development and its practice.

## The Guide: How Did it Come to Be?

The creation of The Educational Developer's Portfolio guide reflects several factors:

- the collective interests and efforts of a number of Canadian educational developers, several of whom have authored chapters in this publication or contributed to its development in other ways (refer to the About the Authors section);
- the support of the EDC executive; and
- the culmination of various events and occurrences over a period of several years within the Canadian educational development community.

If we look at the aims of the EDC (2015a), the foundation for this guide was set early in its history with the passing of the EDC by-laws in 2006 (EDC, 2015b). Several, if not all, of the by-law aims situate the need for a portfolio, including: professionalization of the educational developer role; communication amongst members of the EDC, and by extension the STLHE; and the professional development of new, experienced, and potential educational developers (EDC, 2015a). The EDC values of collaboration, open community, ethical and scholarly practice established in 2011-2012 (EDC, 2015e) further influenced the spirit and direction of the portfolio action group and the guide's creation (e.g., community consultation, world café data collection, ethics approval). Likewise, the EDC's original Five-Year Plan (2005-2009), now called Our Living Plan since its first review (EDC, 2015d), established an interest in and need for career and capacity building professional development opportunities (e.g., specialized institutes) and tools (e.g., philosophy statement and portfolio).

As a result of the first review and update of the Five-Year Plan in 2009-2010, and a mounting focus on professionalization of educational developers by the EDC executive, a subcommittee chaired by Ruth Rodgers (then EDC executive secretary) on the "portfolio model" was established (EDC, 2011). At about the same time, in

February 2011, the first pre-conference offering of the EDC Institute took place at Algoma University. Both initiatives built on emergent educational development scholarship (see Dawson, Britnell, & Hitchcock, 2010a; McDonald & Stockley, 2010;) and the revised Living Plan.

The work of the original portfolio group led to the identification of sample developer portfolios and the development of stage-based competency matrices (Rodgers, 2012a, 2012b, 2012c) aligned with possible forms of portfolio evidence. The group's collective efforts and its interest in the scholarly work of the educational developers referenced above brought in several members of the new action group that formed in 2013 – Jeanette McDonald, Erika Kustra, and Debra Dawson – current and former members of the EDC executive (at the time of the guide's publication). This new action group extended the work of the original subcommittee and continued to build momentum and interest in the educational developer's portfolio. Other culminating factors that provided direction to and support for the portfolio action group and the guide are documented in the meeting minutes of the EDC executive (EDC, 2015c) and include, for example:

- growing interest in and discussion of an EDC publication series;
- greater focus by the EDC executive on professionalization of the field and credentialing of educational development practitioners (see EDC discussion paper by McDonald & Borin, 2012);
- expansion of the EDC Institute to a separate, formal multi-day program with a stream each for new and experienced educational developers; and
- community interest in learning about and development of an educational developer's portfolio as evidenced by the uptake and offering of EDC pre-conference (EDC, 2012) and concurrent workshops (EDC, 2014) on the topic of the educational developer's portfolio.

These factors facilitated entry of five new action group members over a two-year period: Paola Borin, Judy Chan, Isabeau Iqbal, Natasha Kenny, and Marla Arbach. With the action group in place, its members set out to explore publication options for the EDC community and begin work on developing a portfolio guide situated in the literature, developed in community, and grounded in a scholarly and ethical approach to design.



## Making the Most of the guide: Intended Audience, Design, and Use

This guide is designed by and for educational developers of all career stages who are working in and outside of post-secondary institutions in various educational developer capacities. They may hold roles such as: independent consultant, centre director, professional staff or faculty member, teaching centre champion, or senior teaching and learning administrator. The concept of an educational developer's portfolio is still relatively new, and its adoption by the educational development community is only just taking root. As such, we have yet to realize its impact and potential. The primary audience of the guide is the educational development practitioner who may be creating a portfolio for the first time. The guide's secondary audiences include developers who are refining, revising, or repackaging their portfolio for a different audience, purpose, or mode of sharing (i.e., online versus paper-based); those assisting others to develop a portfolio; and others still such as centre directors, who are evaluating portfolios for hiring and promotion decisions.

The design and conception of the guide is practical, informational, and applied in form with the end goal being the development and assessment of an integrated portfolio with all its component parts. Each chapter is individually authored and has been reviewed multiple times by action group colleagues and members of the educational development community. The evolution of each chapter reflects the author's scholarship, professional interests, and work experiences; the educational development and higher education literature; feedback from the multi-stage review process; and insights gained from conversations with Canadian and international colleagues through an ethics-approved world café process. While we have aimed for consistency across the guide wherever possible, you may find nuances unique to each chapter reflective of its author and intended purpose.

This guide is designed by and for educational developers of all career stages who are working in and outside of post-secondary institutions in various educational developer capacities.

Depending on your career status and stage of portfolio development, you may choose to engage the guide in different ways. Those new to developing an educational developer's portfolio and/or to the field of educational development may wish to read the guide from beginning to end to get a sense of what it means to be an educational developer and to gauge what's involved in developing, packaging, and evaluating such a document.

Those who have already created a portfolio in full or in part, or, who are evaluating portfolios for hiring and advancement decisions, may prefer to start with a specific chapter of interest. However you choose to interact with the guide, we invite your feedback on your experience using it, and we welcome contributions of sample educational developer portfolios (e.g., excerpts, full portfolios, forms of evidence) to incorporate into future editions or to link to from the [EDC website](#) as supplemental resources.

Contributions and user feedback can be directed to the [EDC Vice Chair: Professional Development](#) ([refer to the EDC website executive listing](#)).

We encourage you to revisit your portfolio and the guide and to involve others in the process as you create, reshape, and refine your portfolio for its intended audience (e.g., a centre director or dean, future employer, or funding agency) and its desired purpose (e.g., personal growth, advancement, employment, promotion, or award recognition). With this operating approach in mind, ongoing refinement, reflection, editorial adjustments, and choice of evidence can be made relative to your career stage, professional role, individual experiences, centre positioning, and institutional status.

We wish you well in the development and evolution of your educational developer's portfolio, and we invite you to get started before a specific and immediate need for it arises. Portfolios are living documents that take time and space to develop and maintain, and represent a significant investment on your behalf.

The remaining chapters of the guide are designed to help you

- appreciate the role and purpose of educational developer portfolios and their importance to your professional role and the field of educational development as a whole (see [Chapter 2](#));
- identify and assess your professional competencies and learning needs for current and future stages of an educational development career (see [Chapter 3](#));
- identify content (e.g., topic headings, artifacts, forms and types of evidence), craft a written narrative, and prepare an integrated portfolio (see [Chapter 4](#));
- articulate an educational development philosophy and approach to practice (see [Chapter 5](#));
- package and present your portfolio online or in print to yourself and others (see [Chapter 6](#));
- assess the merits and authenticity of your portfolio, accounting for its intended audience and purpose – both formative and summative (see [Chapter 7](#)); and
- start or continue the journey of crafting an educational developer’s portfolio (see [Chapter 8](#)).



# Chapter 2

## The Educational Developer's Portfolio

### What is an Educational Developer's Portfolio?

An educational developer's portfolio is a tool used to articulate, reflect upon, and provide evidence of an educational developer's beliefs, values, ethical principles, practices, approaches, development, and impact. It is not an extensive collection of everything related to an individual's work (though a large master portfolio may be a good starting place); rather, it is a careful selection of evidence, integrated with thoughtful reflection, that tells a unique narrative, one that is specific and authentic to the author.

The concept of a portfolio has roots in the idea of an artistic portfolio where artifacts are gathered as evidence of an artist's skills. Teaching portfolios, also known as teaching dossiers, build on this concept. They bring together artifacts that demonstrate an individual's teaching philosophy, instructional practices and approaches, and impact as a teacher; these components are integrated through thoughtful reflection to provide context and depth to the artifacts used as evidence (see Knapper & Wright, 2001; Seldin, Miller, & Seldin, 2010; Shore et al., 1986).

An educational developer's portfolio parallels a teaching dossier, and, in many cases, will integrate or build upon a teaching dossier, demonstrating the interconnections between educational development and instructional practices. A developer portfolio allows individuals to document and reflect on their own professional practice, adding evidence aligned with the competencies, skills, and impact of an educational developer, such as supporting the development of other teachers, curriculum design, institutional quality enhancement, organizational change, educational leadership, and

supporting a culture of teaching (see [Chapter 3](#) for competencies). While the common content and process for developing an educational developer's portfolio is more fully explored in [Chapters 4](#) and [5](#), it can be helpful to compare the major components of a teaching dossier with an educational developer's portfolio, as many educational development practitioners may already have components of a teaching dossier prepared or may work with instructors to support development of a teaching dossier (see [Table 2.1](#)). Given that some educational developers will have developed a teaching dossier that documents their teaching before they move into an educational developer role, and some will maintain disciplinary teaching during their tenure as an educational developer, it is possible to have two separate documents, a teaching dossier and educational developer's portfolio. You may choose to keep them separate or integrate the two aspects of your professional practice into a coherent educational developer's portfolio.

Common components of a portfolio may be conceived as addressing:

1. **Beliefs.** What you believe about educational development in the form of a philosophy, aligned with evidence and reflections throughout the portfolio (see [Chapter 5](#)). What are your values? What are your ethical principles?;
2. **Actions.** What you do in terms of your professional responsibilities (e.g., consultations, projects), teaching experience, practices, approaches, leadership, contributions to the profession, and personal ongoing development (see [Chapter 4](#)); and
3. **Impact.** What impact you have as an educational developer, supported by evidence throughout the portfolio, including triangulation of data

Table 2.1  
*Comparison of a Teaching Dossier and an Educational Developer's Portfolio*

| Common Components                    | Teaching Dossier  | Educational Developers Portfolio   |
|--------------------------------------|---|--|
| <b>1. Beliefs</b>                    | <p><b>Teaching Philosophy</b><br/> Beliefs, philosophy, perspectives and goals as a teacher</p> <p>What makes you unique or different from another teacher?</p>   | <p><b>Educational Development Philosophy</b><br/> Beliefs, philosophy, perspectives, ethics, and goals as an educational developer that may also include elements of a teaching philosophy and leadership philosophy.</p> <p>What makes you unique or different from another educational developer?</p>  |
| <b>2. Actions</b>                    | <b>Teaching Responsibilities</b>  | <b>Educational Development Responsibilities</b>  |
| a) Roles and Responsibilities        | <p>Summarize teaching roles, responsibilities, and experience</p> <p>This may include teaching, mentoring, supervision, research into teaching in post-secondary education, teaching-related leadership, and any support of others in their teaching.</p> <p>The focus tends to be primarily in helping students learn and improving your own teaching.</p> | <p>Summarize educational development roles, responsibilities, and experience.</p> <p>This may include teaching, mentoring, consultations, projects, supervision, research into teaching in post-secondary education, research into educational development, leadership responsibilities and/or aiding professional development of others related to teaching, learning, and institutional change.</p> <p>The focus is primarily on helping to improve teaching of others, the system and/or the teaching culture of an institution, in order to help improve student learning.</p> |
| b) Course or Curriculum Development  | Development of your own course or program. Experienced instructors may lead curriculum reform or new curricular development.  | Development of courses and curricula to help others with sustained development of their teaching. Aiding others in developing their courses, programs, and curricula.  |
| c) Service                           | Service related to teaching such as committees, action groups, policy development, curriculum re-design, discipline-based organizations supporting teaching within a particular field of study (e.g. Engineering Education).  | Service related to educational development such as local committees, faculty and institutional level committees, provincial/state or national/international committees, action groups, policy development (may also include service related to teaching).  |
| d) Personal Professional Development | Improving your own competency and knowledge in teaching in order to help student learning.  | Improving your own competency and knowledge in educational development in order to help others develop their teaching, or to help one's institution.   |
| <b>3. Impact</b>                     | <p>Student and colleague feedback on teaching.</p> <p>Evidence of impact through teaching.</p>  | <p>Student, participant, and colleague feedback on educational development.</p> <p>Evidence of impact through educational development (e.g., change in participation, change in structures, change in curriculum).</p>   |
| <b>4. Future Directions</b>          | Usually future directions to develop as a teacher. It could include developing as an educational leader or senior administrator (e.g., Faculty Dean, Vice-President Academic).  | Usually future directions to develop as an educational developer, educational leader, change agent, centre director, or senior administrator (e.g., Academic Vice-President or Vice-Provost Teaching and Learning)   |

*Note:* Based on "The educational developer's portfolio," by W. A. Wright, and J. E. Miller, 2000, *The International Journal for Academic Development*, 5(1), p.25. Copyright 2000 by Taylor and Francis Ltd.

from self, others (e.g., colleagues, students, and program participants), and the literature, each providing a lens for reflection (Brookfield, 1995) (see [Chapters 4, 5, and 7](#)).

An effective portfolio has clear alignment between beliefs, actions, and the documented evidence of impact.

The form and composition of an educational developer's portfolio can vary quite extensively, depending on personal preferences, disciplinary origins, and the portfolio's intended audience and purpose. Traditional portfolios are paper-based or designed to be easily printable, but electronic and alternative media are being increasingly used to share information (see [Chapter 6](#)). World Café conversations with educational developers from Canada and abroad indicated that the ideal portfolio is evidence-based and scholarly, an authentic expression of the person as an educational developer (which includes freedom to vary the content and structure), and open to peer-review (Borin et al., 2014; Chan & Iqbal, 2014; McDonald et al., 2014). Ultimately, an educational developer's portfolio provides the space to offer depth and breadth of one's contributions and achievements, and the flexibility to represent diverse forms of educational developer practice. The portfolio provides a narrative that integrates beliefs, actions and impact, providing a sense of the unique person's approach to educational development.

## Who are the Potential Users?

The primary users of an educational developer's portfolio are the educational developers themselves. Developing and maintaining a portfolio provides the opportunity to engage in formative reflective practice (Schön, 1983), to document one's professional activities over time, and to present one's work publically to others.

The second major group includes administrators in leadership and supervisory roles, such as unit managers and centre directors (Borin et al., 2014; Chan & Iqbal, 2014; McDonald et al., 2014). From an administrative perspective, the educational developer's portfolio plays an important role in summative decisions about hiring,

performance reviews, promotion opportunities, and, in some cases, tenure or equivalent permanence (Stanley, 2001). Other possible user groups identified by portfolio action group members and world café conversations include (Borin et al., 2014; Chan & Iqbal, 2014; McDonald et al., 2014):

- students or program/event participants interested in current centre activities;
- mentors asked to provide formative feedback and to support professional development;
- colleagues at other centres interested in models to help develop their own portfolios and inspire their own development;
- reviewers of centres requested to assess the expertise and impact of a centre; and
- funding bodies charged with examining the expertise of educational developers in order to adjudicate proposals.

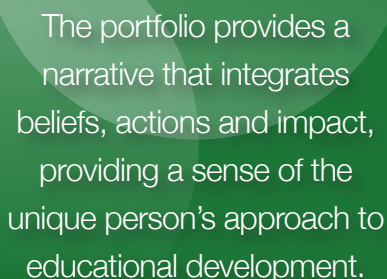
## Why Create One?

The reasons for creating an educational developer's portfolio include both formative development and summative judgment. The reasons listed below map on to all career stages of educational developers identified in

[Chapter 3](#): entry, senior, and director/administrative levels. At each stage, the value of formative reflection and the use of portfolios for summative decisions about hiring, promotion and/or tenure, play a role.

**Formative purposes.** Through a process of reflection-on-action (Schön, 1983), the educational developer's portfolio provides an opportunity for individuals to identify areas of strength as well as gaps in skills or experience. For example, when comparing the competency models identified in

[Chapter 3](#), self-reflection may indicate strengths in team work as a new educational developer, but reveal the need for further development when it comes to conflict resolution. For those interested in future leadership roles, self-examination of the portfolio in relationship to the skills and competencies identified for centre directors (e.g., budgeting and acting as agents of change) may help guide choice of professional development activities, involvement in special projects, and engagement in mentoring opportunities. Review by colleagues can also



The portfolio provides a narrative that integrates beliefs, actions and impact, providing a sense of the unique person's approach to educational development.

provide formative opportunities to enhance professional practice.

In fact, opportunities for joint peer exchange and feedback can be incredibly helpful for both participants supporting growth and discussion by sharing different experiences, and understanding how other people conceive of their practice. Sometimes an informed “critical friend” (Handal, 1999, p. 63) can identify strengths, weaknesses, and areas for growth that are hidden. Given that we often recommend the development and use of a teaching dossier to instructors and graduate students, it makes sense and shows integrity that we model the preparation and application of an educational developer’s portfolio for our own professional development.

**Summative purposes.** The educational developer’s portfolio also serves a highly pragmatic and summative purpose. In different institutions, the roles played by educational developers may vary or have different emphases as suggested in [Chapters 1 and 3](#). The formal types of educational developer positions may be considered as, for instance, unionized staff members, non-unionized professionals (staff or management), academic- or faculty-based appointments, and academic senior administrators. The varied nature of these positions increases the importance of clearly documenting practice and impact. During the hiring process, for example, there is need to convey not only the complex skills and experience involved in being an educational developer, but also “defining developers’ numerous roles and responsibilities, and ... profiling the developer’s aims, activities and accomplishments in a meaningful, coherent and useful manner” (Wright & Miller, 2000, p.21). Standard documents, such as the curriculum vitae, alone, may not provide the information required for effective judgment about a job candidate’s potential. The educational developer’s portfolio fills this gap by providing complementary evidence and reflection for more effective decision-making (Stanley, 2001). The educational developer’s portfolio, for example, is used by several institutions in human resource decision making (e.g., hiring, promotion, and permanence).

While teaching dossiers have an established history and are often formalized in faculty collective agreements, the educational developer’s portfolio is a more recent phenomenon, only just beginning to take hold as a professional development tool. Individually and as a community, it is appropriate and timely to model the

reflective behaviour we encourage in others. Portfolios can be used to guide and provide evidence of our own professional practice and impact. [Table 2.2](#) summarizes a variety of purposes for creating and using an educational developer’s portfolio as identified by educational developers from Canada, the United States and Europe, who participated in World Café conversations about portfolios (Borin et al., 2014; Chan & Iqbal, 2014; McDonald et al., 2014).

## Conclusion

An educational developer’s portfolio is a tool used to articulate, reflect upon, and provide evidence of an educational developer’s beliefs, activities, and impact. It is both integral to professional development and important for documenting performance and impact in an era of changing roles and context. As noted in [Chapter 1](#), the number of professional educational developers entering the field is growing, and many new and specialized positions are being posted, resulting in greater mobility and increased diversity in required skills. While most universities and colleges have a teaching and learning centre, in Canada and internationally, centres are often unstable, and they are frequently restructured, closed and re-opened as senior administration changes (Challis, Holt, & Palmer, 2009; Grabove et al., 2012; Palmer, Holt, & Challis, 2010). These trends suggest a need to document and demonstrate the expertise and impact of individuals and centres, even when not actively seeking a new position.

The remaining chapters of this guide will help you craft, present, and assess your portfolio for your desired audience and purpose.

Table 2.2

*Purposes of an Educational Developer's Portfolio as identified at World Café conversations*

| <b>Formative</b>   | <b>Summative</b>  | <b>Future</b>  |
|--|---|--|
| Personal reflection for individual growth and development                                  | Personal job application and hiring   | Designing future job descriptions  |
| Documenting practice   | Certification, accreditation, recognition, or award                               | Examining whether certifications or accreditation, or awards would be helpful if offered   |
| Documenting change and growth  | Tenure/permanence and promotion decisions   | Identifying professional development opportunities that professional bodies might provide (e.g., EDC, International Consortium of Educational Developers (ICED)) |
| Documenting Impact   | Evidence of impact - for internal decision-making and for external accountability | Identifying areas needing research in educational development  |
| Facilitating partnerships and sharing practices between units, institutions, and countries | Funding opportunities (sometimes collaborative, sometimes competitive)            | May encourage dialogue and interaction between educational developers and institutions (particularly through electronic portfolios)                              |
| Centre reflection for enhancement  | Centre review - for a summative evaluation  | Historical, capturing trends over time   |

*Note:* From Borin et al., 2014; Chan & Iqbal, 2014; McDonald et al., 2014.



# Chapter 3

## Your Educational Development Career



This chapter explores some of the current research on career development for educational developers and provides tools that new and experienced developers might use to identify and assess their characteristics, skills, knowledge, and competencies.





## Your Trajectory

As discussed in earlier chapters, you should identify intended audiences and purposes as you develop an educational developer's portfolio. Furthermore, it may be helpful to ask yourself three questions:

- Where am I now in my career, and where do I want to go?
- What skills, abilities, knowledge, or competencies do I bring to my work, team, and institution?
- What experience and evidence from my work and educational experiences illustrate acquisition of these competencies?

Creating a portfolio with these questions in mind can assist in identifying gaps that need to be addressed prior to making your next career move.

## Where Are You Now?

Assessing your career requires you to take stock of life, work, and educational experiences that have facilitated your growth as an educational developer. Chapter 1 discussed the rapid expansion in the number of educational developers in higher education worldwide (Gibbs, 2013; Gosling, 2009). As well, the complexity of the role has dramatically increased with far more areas of specialization (Gibbs, 2013) and levels of position available from junior educational developer to senior administrator of teaching and learning. In addition, the work of educational developers is increasingly moving “from the periphery to the center of the institution” (Dawson et al., 2010a, p. 70), requiring educational developers to develop competencies in areas such as strategic planning and policy development. However, as McDonald and Stockley (2008) illustrated, the pathways into the field of educational development are tremendously varied, resulting in no common path or set guidelines to follow to assure career progression (McAlpine, 2006). Some educational developers entering the field may have a strong background in pedagogy from fields such as Psychology or Education, but many others do not. Regardless of the specific focus of your own academic degree, you will have acquired various competencies that enhance your ability to be a successful educational developer. A grounding in pedagogy, whether formalized

through established degrees or acquired through less formal mechanisms, such as self-study or industry experiences, may all lead to educational developers acquiring the competencies required for entry to and advancement in the field, as well as performing one's position successfully. Across the lifespan of their career in educational development, developers will need to assess their existing knowledge, skills, and abilities with the goal of identifying growth needs and learning opportunities for future career advancement.

## Building Career Capacity

**Identifying and building the skills, knowledge and competencies of educational developers.** Research conducted by Dawson et al. (2010a) examined competencies of educational developers at three different levels: entry-level, associate director/senior developer, and director. The United States (U.S.) Department of Education defines competency as “a combination of skills, abilities, and knowledge needed to perform a specific task” (U.S. Department of Education as cited in Voorhees, 2001, p.1.). Dawson et al. analysed 25 typical educational developer job descriptions, creating generic job descriptions for each job level. Next, using an action research approach, 60 educational developers from around the world engaged in a collaborative dialogue research process to formulate a competency model for each job level. These models were based on the U.S. Department of Education Competency Model (Voorhees, 2001), which emphasize how integrative learning experiences lead to development of competencies. According to the Voorhees model, individuals possess specific characteristics and/or traits making them suited to specific careers, and through formal and informal educational and work experiences, they acquire the necessary skills, knowledge, and, most importantly, competencies to be successful in their vocation. For Voorhees, assessment of these skills, abilities, knowledge, and competencies must be a continuous process. These assessments may be done by peers, mentors, or others who have knowledge of educational developers' competencies. The model stresses the need to provide demonstrations or evidence of the acquisition of skills, knowledge and competencies. An educational developer's portfolio is the tool to demonstrate such

Across the lifespan of their career in educational development, developers will need to assess their existing knowledge, skills, and abilities with the goal of identifying growth needs and learning opportunities for future career advancement.



evidences.

Additional researchers have built on and used the three competency models developed by Dawson et al. (2010a). For example, Rodgers (2012a; 2012b, 2012c) worked with a group of educational developers at the 2012 EDC Institute to elaborate on these models, indicating where individuals might acquire such skills, knowledge, and competencies, and how evidence might be provided in an educational developer's portfolio. These three models of the perceived competencies of developers have also been utilized by leaders in educational development at institutes and conferences of the EDC and the POD Network.

The next sections describe the three competency models to help developers assess their current competencies and set goals for ongoing professional learning (Dawson et al., 2010a).

**Entry-level educational developer.** At the entry-level to the profession, the developers in Dawson et al.'s (2010a) study suggested novice developers need to have basic characteristics or traits that make them suited to the profession, with some evidence of the initial development of competencies, such as team building, planning, and implementation. These findings supported Chism's

(2007) research of 560 developers who rated their skills and knowledge related to educational development as low to moderate when they entered the profession. Figure 3.1 is the model created by the Dawson et al. study participants to demonstrate the characteristics, skills, abilities, knowledge, and competencies they believed were critical for the success of entry-level educational developers.

When asked to rank the top characteristic, skill, knowledge, ability, or competency needed for entry to the profession, study participants ranked as the highest priorities:

- [being a] team player;
- evidence of reflective practice;
- knowledge of curriculum development theory; and
- facilitation ability and effective communication skills.

These characteristics, skills, knowledge, abilities, and competencies are important for the work that entry-level developers perform, such as facilitating workshops and working collaboratively with faculty to enhance teaching and learning at the individual or group level (Dawson et al., 2010a). Gosling (2009), in his study of 40 United Kingdom institutions, noted educational development

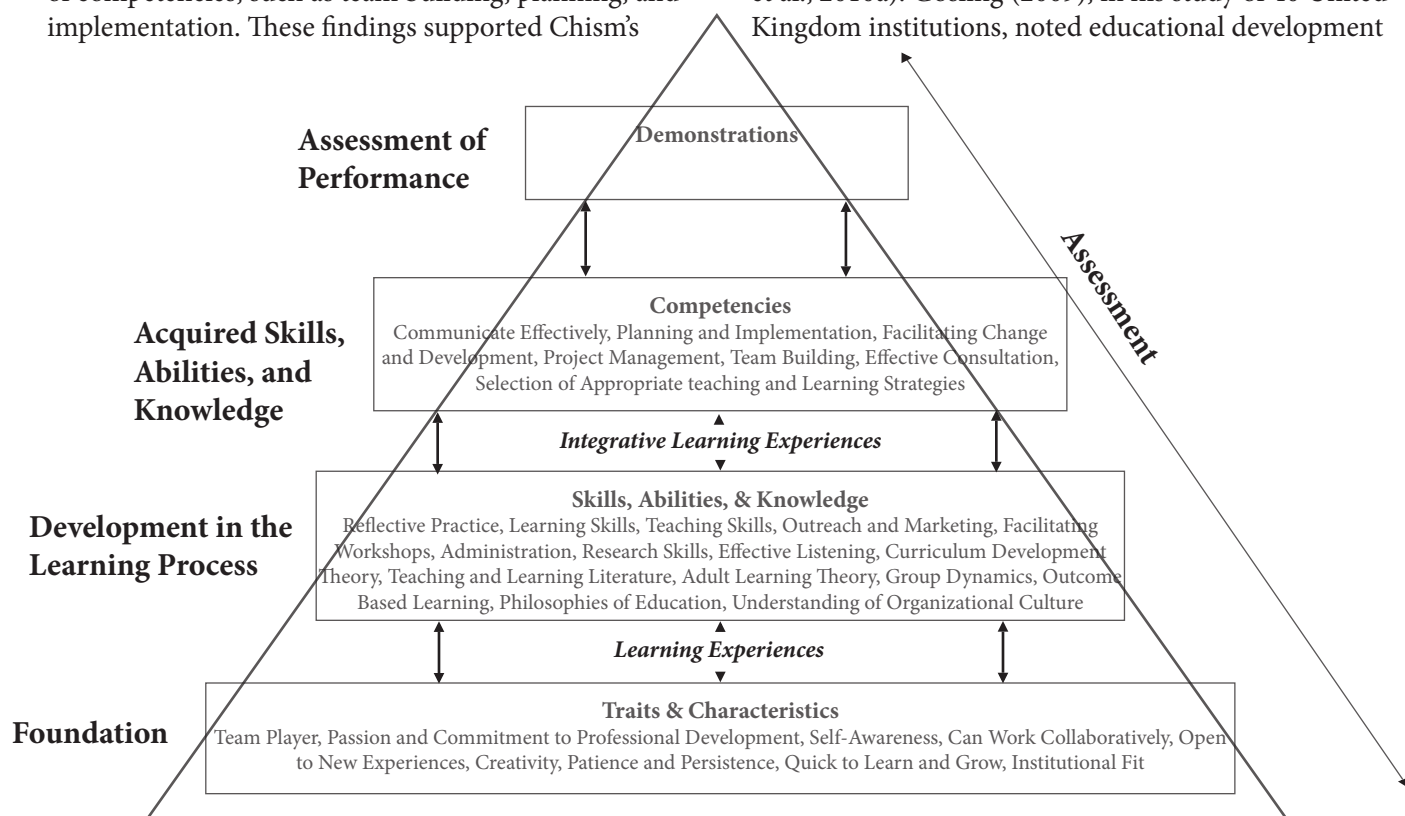


Figure 3.1. Competency Model for the Entry-Level Faculty Developer. From "Developing competency models of faculty developers: Using world café to foster dialogue" by D. Dawson, J. Britnell, and A. Hitchcock, 2010, *To Improve the Academy*, 28, p.16. Copyright 2010 by John Wiley & Sons, Inc. Reprinted with permission. This figure is not included in the CC-BY license.

staff members were often responsible for the training of graduate students who teach. Similarly, in Canada, many beginning educational developers work on teaching assistant (TA) training programs. Finally, Fraser et al. (2010) suggest that in both the United Kingdom and the United States, the model of educational development is very collegial and collaborative with educational developers working alongside faculty members to enhance teaching and student learning. It is evident from the entry-level model that many of the skills, abilities, knowledge, and competencies, such as reflective practice, understanding of organizational culture and effective listening, which are required of beginning educational developers, are essential for developing and maintaining these collegial relationships.

The research of Dawson et al. (2010a) also asked how individuals might demonstrate the achievement of these competencies. For the entry-level developer, the suggestions included peer assessment of presentations, formal feedback from faculty members, development and assessment of new programs created, and evidence of the ability to solve ill-defined problems. Inventory 3.1 (see [Appendix A](#)) provides a tool developers might use to assess how well their characteristics, skills, knowledge,

abilities, and competencies match those of other entry-level developers. As there may be competencies that are specific to your position that are not captured by the inventory, several blank lines are added to the inventory allowing you to add in two additional items. Completing the inventory may also help you gain insight into potential areas that need development. Concurrently, we recommend that you begin documenting how you could demonstrate the achievement of these competencies. More information on documenting your competencies can be found in [Chapter 4](#).

**Associate director / senior developer.** The next model (see Figure 3.2) is for a senior educational developer. At this stage, the educational developer is expected to have most of the competencies indicated for beginning developers, but also needs additional competencies or, in some instances, a deeper level of skill or knowledge of areas such as effective listening or reflective practice. The developer also needs to demonstrate concretely how these competencies go beyond what is expected at the novice stage. At this career stage, there is a greater focus on leadership with the individual being expected to demonstrate greater competence at diplomacy and mediation. The focus is now on the middle tier of

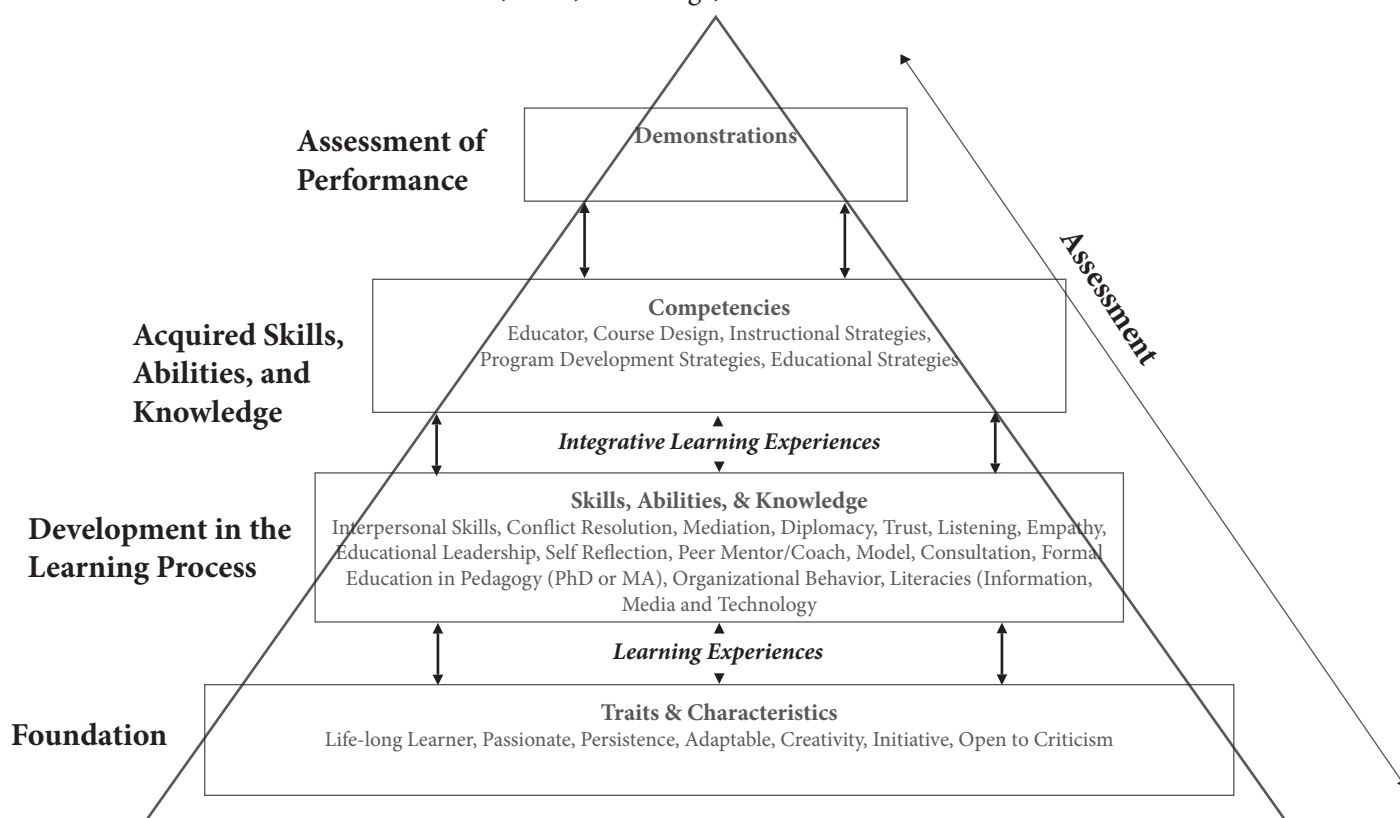


Figure 3.2. Competency Model for the Senior-Level Faculty Developer. From “Developing competency models of faculty developers: Using world café to foster dialogue” by D. Dawson, J. Britnell, and A. Hitchcock, 2010, *To Improve the Academy*, 28, p.17. Copyright 2010 by John Wiley & Sons, Inc. Reprinted with permission. This figure is not included in the [CC-BY license](#).

the pyramid - on skills, abilities, and knowledge. The participants in the study by Dawson et al. (2010a) also suggested that there is a greater likelihood that senior educational developers in the university setting will have achieved a PhD in a specific discipline. In the college sector, they are more likely to have a graduate degree plus specific industry or field experience.

Again, in this research, participants ranked several of the variables more highly than others. In order of importance, the top ranked choices were:

- being an effective educator (in both curriculum and instructional strategies),
- strong interpersonal skills,
- formal education in pedagogy, and
- being passionate about enhancing teaching and learning.

Assessment tools they suggested that could be used to evaluate these competencies included a portfolio, evidence of teaching development, growth of programs, and program participant evaluations.

Completing Inventory 3.2 (see [Appendix B](#)) will allow you to reflect on your competencies at the senior developer level. This set of characteristics, skills,

knowledge, abilities, and competencies for the senior educational developer position are in addition to those found in Figure 1.

**Director.** The final model (see Figure 3.3) created by the participants in Dawson et al.'s (2010a) study is for the director of an educational development unit. The focus at this job level is now on the top tier of the pyramid, and on competencies related to change management and to facilitating change both within and beyond the institution. Again, the expectancy is that the director has acquired the competencies described in the earlier models and that these competencies are at this point fully honed.

The director's role emphasizes advocacy, leadership, and managerial skills. At this level, you must be capable of having a broad vision for the institution and moving that vision into action. Gosling (2009) found that as developers become more involved in strategic planning within their institutions, their role as expert mediators becomes paramount. Within higher education institutions, Gosling found a tendency for a dispersed model of educational development that requires the director to manage a central unit while communicating and coordinating activities with educational developers

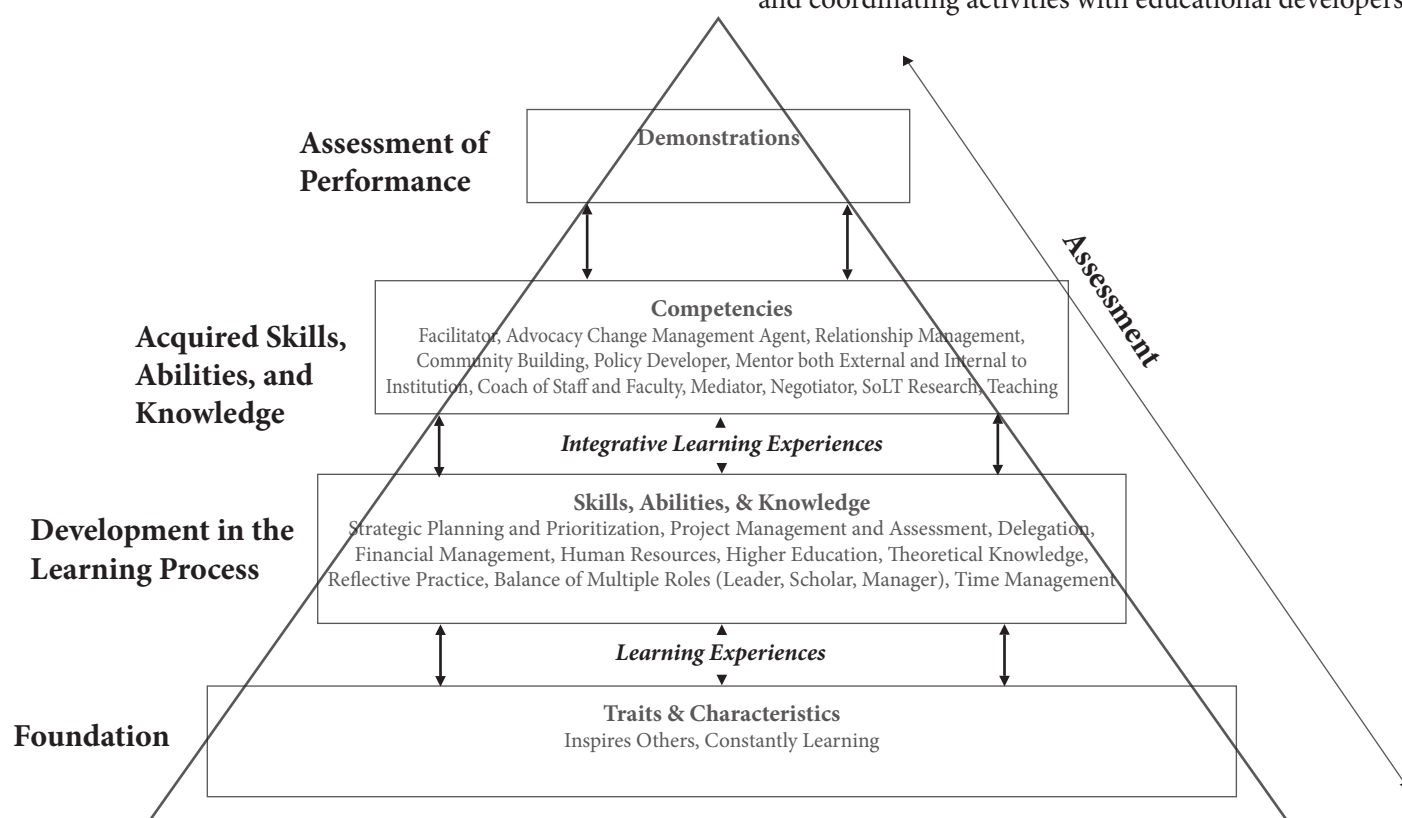


Figure 3.3. Competency Model for the Director of a Faculty Development Centre. From “Developing competency models of faculty developers: Using world café to foster dialogue” by D. Dawson, J. Britnell, and A. Hitchcock, 2010, *To Improve the Academy*, 28, p.15. Copyright 2010 by John Wiley & Sons, Inc. Reprinted with permission. This figure is not included in the [CC-BY license](#).

who are embedded with the disciplines. This ability requires complex leadership and managerial skills. In addition, the individual must have the financial acumen to manage multi-faceted budgets, as units expand in size and increasingly rely on non-base budget support from grants and other sources to manage and maintain their units. The role of the director as “Change Agent” was strongly stressed by participants in several research studies (see Chism, 2007; Dawson et al., 2010a; Gibbs, 2013; McDonald, 2011; Sorcinelli et al., 2006). In order, the skills and competencies that were most highly valued by Dawson et al.’s study participants were:

- balancing multiple roles;
- time management;
- facilitator;
- advocacy and change management agent; and
- strategic planning.

Evidence of the acquisition of these skills and competencies is complex. Educational developers may construct strategic plans or grants, receive external funding, demonstrate staff satisfaction, as evidenced by lower turnover rates or create qualitative artifacts (Dawson et al., 2010a). Completing Inventory 3.3 (see [Appendix C](#)), which builds on the characteristics, skills, abilities, knowledge, and competencies of the earlier models, may assist you in determining your level of expertise as well as what areas you might want to consider for development in the future.

At the director level, the notion of “threshold concepts” may provide an additional lens through which to view the development of educational developers’ expertise. Meyer and Land (2003) define a threshold concept as “akin to a portal, opening up a new and previously inaccessible way of thinking about something. It represents a transformed way of understanding, or interpreting, or viewing something without which the learner cannot progress” (p. 412). These threshold concepts are also developmental in nature, moving individuals from one stage of understanding (in a discipline, for example) to another. For Meyer and Land, threshold concepts tend to be difficult to acquire and lead to irreversible shifts in thinking and ways of being/identities.

In a recent study, Timmermans (2014) identified threshold concepts in the careers of senior educational developers; that is, the ideas and experiences that have been transformational in the professional formation of the experienced educational developers in the study. Her

findings suggest that directors have acquired certain ways of knowing and being that allow them to be not only successful in their positions, but also considered leaders in the educational development community.

Timmermans’ (2014) participants collectively identified 21 threshold concepts. All participants agreed that “facilitating a change process” is the essence of the work of educational developers, and that this “involves helping or leading individuals or groups through a problem-solving process which helps achieve transformation in order to enhance learning” (p. 310). This focus on change management reflects the same competencies that Dawson et al.’s (2010a) study participants thought were key to the success of directors. The remaining 20 threshold concepts identified were divided into three categories: “Category 1: ways of knowing and being that facilitate change in individuals and groups” includes threshold concepts such as, “Starting where people are, Respecting and drawing out knowledge and Building capacity” (p. 311). To do this requires strongly honed interpersonal skills, again a key characteristic of experienced developers. “Category 2: ways of knowing and being that facilitate systemic change” focuses on systemic change and has threshold concepts such as “Being an advocate, Leadership, Thinking and acting strategically” (p. 312). “Category 3: core ways of knowing and being” (p. 310) has threshold concepts, such as “Collaborating and building relationships, Adopting a scholarly approach to practice, Reflecting” (p. 313). By the time individuals are in a director’s position, they should be enacting the ways of understanding and being inherent in these key threshold concepts. To do so requires a complex set of characteristics, skills, knowledge, abilities and competencies.

## Next Steps

By examining these three models and completing the inventories appropriate to your individual career stage, you can begin to identify areas you may wish to develop to aid in your career progression and be better prepared to begin to build an educational developer’s portfolio. Initially, you should focus on one or two areas for development that you would like to explore. Work done by Rodgers (2012a, 2012b, 2012c) looked at some suggested pathways for developing those skills, abilities, knowledge, and competencies. [Table 3.1](#) outlines some of these pathways. Expanding on your competencies will help you to acquire those critical threshold competencies

outlined by Timmermans (2014) and will build your educational development capacity. Transitioning from one career level to the next will require you to provide evidence of competencies at each level. Educational developers may also need to consider taking advantage of opportunities to expand their scope of practice by participating in short-term job exchanges between centres and even moving between centres when positions become available. Job competencies may also be acquired and demonstrated through being on the boards or action groups of local and national organizations, such as the Council of Ontario Educational Developers or the [EDC](#).

Training is frequently informal for educational developers, yet, as Gibbs (2013) suggests, educational development is becoming increasingly scholarly with developers now performing and publishing research on both teaching and learning and educational development. In fact, he states that, in several contexts, promotion at the university level is unlikely to occur without a record of publication. Fraser et al. (2010) also stress the role of educational development in fostering educational research in higher education. This has evolved, they state, into the current focus of many university teaching and learning centres on the scholarship of teaching and learning. Gosling (2009) also found that contemporary educational developers are likely to play a role in creating strategies and in actually writing policies at the institutional level. Furthermore, Fraser et al. suggest teaching and learning centres are often now at the forefront for assisting with the implementation of strategic plans. When selecting appropriate artifacts to showcase in their portfolios, individuals may identify gaps and obstacles in their preferred career pathways. They may then be able to make informed and strategic decisions for their next steps in educational development. [Chapter 4](#) offers suggestions about what artifacts to include in your portfolio.

## But What About the Future?

The work of developers is becoming increasingly complex (Chism, 2007; Dawson et al., 2010a; Gibbs, 2013; Timmermans, 2014). Although Dawson et al. developed a generic description of the novice educational developer's position, it is apparent that educational development centres are increasingly differentiating the role even at this early stage, and this may require new developers to have specialization in specific areas such as eLearning, curriculum, or aboriginal issues. Fraser

et al. (2010) conclude that educational development work has moved from focusing on the individual to an institutional approach, and now, in many countries, a sector-wide educational development approach has emerged. To perform work at this level may require educational developers to acquire even more complex competencies.

At the director stage, Sorcinelli et al. (2006) suggest as we move into the “age of the network” (p. 157), leadership development of university administrators will become a bigger focus of teaching and learning centres. McDaniel (2002) and Smith and Wolverson (2010) examined higher education leadership competencies, and their work with senior university administrators aims to determine a new model of higher education leadership competencies. Smith and Wolverson found that there are five groupings of competencies required for higher education leadership: analytical leadership (which they define as entrepreneurship, creativity and strategic thinking), communication leadership, student affairs leadership, behavioural leadership, and external relations leadership. What is the role of an educational developer in fostering the leaders of tomorrow for higher education? What educational leadership competencies will be required of educational developers to lead in the higher education units of the future? With the recent emergence of a new category of developers in Canada, specifically Associate Vice Provosts (Teaching and Learning), it is clear that educational development has moved from the periphery to the centre of the institution (Dawson et al., 2010a) and that we will be called upon more frequently as part of the senior administrative team to lead the strategic direction of those institutions. The competencies and artifacts that we will be required to document for this level of educational leadership still need to be more clearly defined.



Table 3.1

*Pathways to Developing Characteristics, Skills, Knowledge, and Competencies in Educational Development*

| Pathways to Development |   |
|-------------------------|---|
| Characteristics         | <ul style="list-style-type: none"> <li>• Educational Developers Caucus (EDC) conferences (E)</li> <li>• EDC Institute (E)</li> <li>• Discipline Professional Development (PD) experiences (E)</li> <li>• Institutional PD experiences (E)</li> <li>• Secondments (E)</li> <li>• Contributions to educational Blogs / newsletters (E)</li> <li>• Peer mentorships (E)</li> <li>• Community of Practice / learning circles (E)</li> <li>• Committee work (E, S)</li> <li>• Teaching / work projects and collaborations (E, S)</li> <li>• Portfolio development (E, S)</li> <li>• ED projects and activities (S)</li> <li>• Committee work (S)</li> <li>• Observations, peer mentoring (S)</li> <li>• Self-directed study and informal / formal research (S, D)</li> <li>• Development of leadership style (S, D)</li> <li>• Self-assessment and development plans (S, D)</li> <li>• Find mentors and models (S, D)</li> </ul>   |
| Skills                  | <ul style="list-style-type: none"> <li>• Adult learning credentials, programs, and courses (E)</li> <li>• Institutional peer mentoring (E)</li> <li>• Research experiences (E)</li> <li>• Teaching experiences (in discipline, in Centre, Graduate Assistant / Teaching Assistant development) (E)</li> <li>• Institutional PD experiences (E)</li> <li>• Committee participation (E)</li> <li>• Learning Communities (local, national, international) (E)</li> <li>• EDC grants; assisting with research projects; Scholarship of Teaching and Learning (SoTL) journals (E)</li> <li>• EDC and other conferences (E, S)</li> <li>• Workshops and other PD on facilitation, change and conflict management, mediation etc. (S)</li> <li>• Graduate courses (S)</li> <li>• ISW training (S)</li> <li>• Workshops and other PD on relevant topics (management institutes etc.) (D)</li> <li>• Graduate or training courses (D)</li> <li>• Peer mentoring (D)</li> <li>• Team projects/ collaborations (D)</li> <li>• Good hiring practices (job descriptions, training, mentoring etc.) (D)</li> <li>• Networking with other Directors (D)</li> </ul> |
| Knowledge               | <ul style="list-style-type: none"> <li>• Adult learning courses, credentials etc. (E)</li> <li>• Portfolio development sessions (E)</li> <li>• Facilitation training (E)</li> <li>• Independent study (key texts list needed) (E)</li> <li>• TED talks (E)</li> <li>• Conferences (E)</li> <li>• Local events with guests/discussions (E)</li> <li>• GA/TA development (E)</li> </ul>   |

Table 3.1  
*Pathways to Development*

|              |  |
|--------------|--|
| Knowledge    | <ul style="list-style-type: none"> <li>• Graduate programs (S)</li> <li>• Self-study and peer critique (S)</li> <li>• Appreciative Inquiry projects (S)</li> <li>• PLAR process (S)</li> <li>• EDC, Professional and Organizational Development (POD), International Society for the Scholarship of Teaching &amp; Learning (ISSoTL) etc. (S)</li> <li>• PD on various topics (S, D)</li> <li>• Graduate programs/ courses (D)</li> <li>• Self-study (D)</li> <li>• Inter-institutional collaborations / secondments/ fellowships (D)</li> <li>• Director group meetings (Ontario )/ EDC regional groups (D)</li> <li>• HR training opportunities (D)</li> </ul>   |
| Competencies | <ul style="list-style-type: none"> <li>• Experience (workshops / series) (E)</li> <li>• Courses (E)</li> <li>• Formal certifications (i.e. project management) (E)</li> <li>• Various contexts and spaces (E)</li> <li>• Team teach, sharing of resources, shadowing (E)</li> <li>• Debriefing after events (E)</li> <li>• Resource development and archiving (scripts, process documents) (E)</li> <li>• Courses, programs, certificates (S)</li> <li>• Connect with provincial bodies (i.e., Higher Education Quality Council of Ontario (HEQCO), Council of Ontario Educational Developers (COED), Canadian Society for Professional and Organizational Development (CSPOD)) (S)</li> <li>• Facilitator development/credentials (S)</li> <li>• Mentoring (S)</li> <li>• Independent study (S)</li> <li>• Centre for Higher Education Research and Development (CHERD) (U of Manitoba) or Chair Academy (US) (S)</li> <li>• POD, ISSoTL, International Consortium for Educational Development (ICED), Staff and Educational Development Association (SEDA) (S)</li> <li>• Experience! (S, D)</li> <li>• EDC PD sessions and conference (S, D)</li> <li>• Courses and PD sessions (D)</li> <li>• Taking time to develop own portfolio (D)</li> <li>• Committee work (D)</li> <li>• Local network (D)</li> </ul> |

Note: (E) = Entry-Level, (S) = Senior Level, (D) = Director Level. Adapted from three tables developed by Rodgers (2012a; 2012b; 2012c).



# Chapter 4

## Developing a Portfolio: Getting Started

Your completed portfolio is an integrated and comprehensive document that is grounded in an educational development philosophy, critically reflective commentaries, and representations of the scope, quality, and impact of your educational development practice. It provides insight into the ethical principles that guide your work (see, for example, POD Network, 2015) and demonstrates engagement with appropriate scholarly literature and with key ideas in educational development (Trevitt, Stocks, & Quinlan, 2011). The portfolio's narratives provide authentic accounts of your context, approaches, and beliefs and connect the various portfolio elements to each other (Trevitt & Stocks, 2012). If you have teaching experience, your portfolio is also the place to examine the interconnections between your educational development and teaching practices. In this chapter, the steps involved in creating your educational developer's portfolio are described. Though these have been presented as sequential for the sake of clarity, they rarely are so in practice. Furthermore, many of these steps are continuous because of the ongoing nature of a portfolio.

## Building Your Portfolio

The process of creating a portfolio is not linear, but iterative (Donnelly, 2003). The author typically begins with a purpose and audience in mind, and then simultaneously builds a narrative and selects materials for inclusion.

**Setting purpose.** At the outset, you will determine your portfolio's purpose. This initial step is important because the purpose will influence the questions you ask yourself, the structure of your portfolio, the tone and level of formality, and the selection of your materials (Costantino & De Lorenzo, 2006; Seldin et al., 2010). As mentioned in previous chapters, there are various reasons for creating a portfolio, including: reflecting on your philosophy and approaches to practice, providing evidence of your expertise, identifying areas for improvement, and as part of a job application (see Chapter 2 for additional examples). If you choose to create a portfolio that fulfills more than one purpose, it is advisable to carefully distinguish between your primary and secondary purposes as you design and assemble your portfolio (see Chapter 6). Establishing your purpose allows you to easily identify your audience and portfolio context. Keep your primary readers in mind and consider what evidence they may expect to find and are likely to find compelling as you plan and structure your portfolio (Seldin et al., 2010).

**Choosing content.** The next step in the creation of your portfolio is to collect and choose items that are needed to fulfill the portfolio's purpose; this phase is intertwined with the creation of your narrative. The portfolio materials, often referred to as artifacts, support your stated beliefs, values, and educational development approaches. They also provide evidence of your relevant activities and accomplishments and demonstrate the breadth and complexity of your practice. Since "the portfolio is not simply a collection of evidence but is a way of coming to understand and record learning" (Trevitt et al., 2012, p. 164), it is important that you be selective about which items to include. Asking yourself

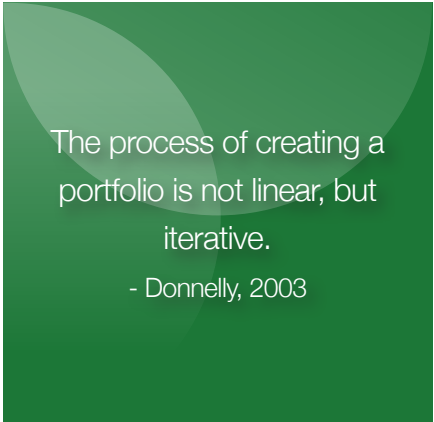
the following questions may be helpful as you go through the selection process for your digital or paper portfolio:

- Are the artifacts aligned with the purpose of my portfolio?
- Do these artifacts provide meaning to my portfolio?
- If this artifact was removed, would the credibility and/or quality of my portfolio be diminished? (Costantino & De Lorenzo, 2006)

It is essential that all parts of your portfolio align with one another. Your philosophy, the descriptions of your responsibilities, methods and approaches, and the evidence of your achievements should connect to each other in meaningful ways such that your portfolio stands as an integrated document (Seldin et al., 2010). [Table 4.1](#) provides a tool for thinking about alignment in your portfolio.

**Portfolio narrative.** The portfolio's narrative is a purposeful story about your educational development practice, leadership, and scholarship. Since a narrative is a lived and told account of your experiences (Creswell, 2012), writing your narrative helps you make sense of your experiences and is a vehicle for your learning (Merriam, Caffarella, & Baumgartner, 2007). Costantino & De Lorenzo (2006) suggest three types of portfolio narratives: introductions, explanations, and reflections.

- Introductions provide an overview of the material that follow and are typically found at the beginning of the document or at the start of a new section. They provide important context for your reader.
- Explanations, on the other hand, supply your reader with a stronger understanding of the artifacts you have included in order to support your portfolio's overall purpose. This text allows you to relate an event or describe the relevance of an artifact.
- Reflections are the element that most distinguishes your portfolio from a collection of essays (Trevitt et al., 2011). The importance of reflection as a tool for learning is well established (Ryan, 2012; Schön,



The process of creating a portfolio is not linear, but iterative.  
- Donnelly, 2003

Table 4.1  
*Framework for Aligning an Educational Developer's Portfolio*

| Objectives  | Underlying Beliefs   | Concrete Actions  | Evidence   |
|---|--|---|--|
| What am I striving to do?   | What are the key beliefs that I hold related to my educational development practice, leadership and scholarship? What ethical guidelines inform my practice?   | What educational development strategies and approaches do I use that support these claims?  | What sources of data, documentation and materials provide evidence of my educational development strategies and approaches and of the effectiveness of these approaches?             |
| Encourage the instructors I work with to strive for alignment in designing their courses. | The best teachers think carefully about their course goals and objectives and plan activities/assignments accordingly. They have student learning front and centre.  | Through conversations, workshops, and other resources, I introduce instructors to Finks' (2013) concept of significant learning and integrated course design. I work with them to assess and (re)design their courses and teaching.                                     | Resources I use in consulting with instructors<br>Lesson plans for workshops I offer related to alignment and backward design.<br>Syllabi (before and after).                        |
| Mentor new educational developers.  | Individuals often come to this profession by chance and without knowing much about it. Their understanding of educational development and their practice can be enhanced with an augmented awareness of the field. | I spend time conversing with new educational developers about the profession, including introducing them to the <u>Educational Developers Caucus</u> (EDC) and to relevant publications. We discuss how their goals can fit into an educational development profession. | Extent to which new educational developers refer to themselves as "educational developers."<br>New educational developers' involvement in <u>EDC</u> (or other relevant) activities. |

*Note:* Based on "The educational developer's portfolio," by W. A. Wright, and J. E. Miller, 2000, *The International Journal for Academic Development*, 5(1), p. 28. Copyright 2000 by Taylor and Francis Ltd.

1983). Through reflection, authors inquire into their behaviours, values, beliefs, competencies, professional identity, and mission (Tigelaar, Dolmans, De Grave, Wolfhagen, & Van der Vleuten, 2006). Reflections also enable the reader to get a sense of your decision-making processes, ethical principles, and analytical approaches and reveal your ability to think about your own learning and growth.

Table 4.2 presents a tool for reflecting on and documenting your activities as an educational developer. Keeping an ongoing record of your work and reflections can help you build and evolve your portfolio.

## What to Include in Your Portfolio?

Individual portfolios vary considerably, depending on the purpose of the portfolio, the author's educational development experience and career stage (see Chapter 2), their familiarity with the educational development literature, and their own preferences and priorities. The format of the portfolio (e.g., paper or digital) also has an influence. Listed below are suggested headings and items for inclusion in your portfolio. These items include material from the developer (e.g., a philosophy statement, a description of responsibilities, specific goals) and materials from others (e.g., feedback from colleagues, program participants, certificates). When including materials from others, it is important to be mindful as to whether you have permission to share that material or not (i.e., Is the material confidential? Do you need/have you received permission? Can you make it anonymous?). When including material that has been created collaboratively, you should note this as well and indicate what your role was in producing the material.

As mentioned in Chapter 2, some educational developers assemble a master portfolio from which they then pick and choose relevant items as they create portfolios for different purposes and audiences. The inventories (refer to the appendices) and tables referenced in Chapter 3 offer examples of content and evidence you may wish to include in your portfolio. See also the "Materials to Include in Your Educational Developer's Portfolio" checklist found in Appendix D of this guide.

Below we have identified nine sections of focus to include in your portfolio. These sections are not exhaustive, but they provide a basis for getting started.

**1. Educational development philosophy.** Your educational development philosophy is a reflective statement that summarizes how your approaches align with your beliefs, values, and ethical considerations for practice. As mentioned in Chapter 5, the key claims made in your philosophy statement provide a framework for the presentation and alignment of evidence throughout your portfolio (Schönwetter, Sokal, Friesen, & Taylor, 2002; Wright & Miller, 2000).

## 2. Educational development roles and responsibilities.

This section of your portfolio provides brief descriptions of your roles and responsibilities in programs, services, initiatives, policies, and other projects you are, or have recently been, involved with. Depending on your career stage (see Chapter 3), and the volume of activities in which you are or have been engaged, this section may be comprehensive of all your experience or limited to current and recent practice. Refer to Chapter 6 for ideas on arranging portfolio materials.

Consider including information about:

- consultations, facilitation, program planning, advising, and teaching
- coordination, evaluation, administration, supervision, research, writing, and organizing
- educational leadership, change agent role, policy development, and strategic planning
- institution, job title, and date of appointment

## 3. Educational development approaches, methods and materials.

In this section, you present an overview of your educational development approaches, in particular those that illustrate your philosophy statement, and, if appropriate your discipline focus. This section should be supported by a sampling of materials related to those approaches.

Consider including:

- strategic plans
- session descriptions and workshop plans
- policy documents
- resource guides
- curriculum development maps
- proposals
- peer observation reports
- agendas for retreats and workshops

Table 4.2

*Reflecting on and Documenting Your Activities as a Developer*

A portfolio is more than a listing of accomplishments and activities. Entries included in each sub/section of your portfolio should, ideally, align with philosophy statement claims/values; identify what, how, and why you do what you do; ground your practice in the literature; and provide evidence of impact and effectiveness. Easier said than done! The following table provides a mechanism to record, reflect upon, and make linkages between sections of your portfolio.

| Activity  | My Role (Context)  | Preparations  | In the Moment  |
|---|--|---|--|
| One-on-One Consultation                                 | <ul style="list-style-type: none"> <li>• Asked to meet with instructor about crafting a teaching portfolio</li> <li>• Goal: facilitate conversation, identify needs, share resources</li> </ul>                                  | <ul style="list-style-type: none"> <li>• Assessed stage of portfolio development and requested materials to review in advance</li> <li>• Identified audience and purpose of portfolio (to help guide conversation)</li> <li>• Confirmed if the professor previously attended a dossier workshop</li> <li>• Reviewed existing portfolio materials; consulted literature (e.g., Seldin et al., 2010)</li> <li>• Identified strategy to welcome and begin/continue conversation based on previous connections</li> </ul> | <ul style="list-style-type: none"> <li>• Took notes during consultation, indicating to the individual that it helped with sharing observations in-the-moment and providing a written summary via email with resources</li> <li>• Observed body language and tone to ensure authenticity of conversation and level of comfort of professor</li> <li>• Smiled, used hand/body gestures, and made eye contact as appropriate</li> </ul> |
| Community of Practice (CoP) meeting (flipped classroom) | <ul style="list-style-type: none"> <li>• Bring together faculty and instructional staff who attended the Centre's Flipped Classroom event and expressed interest in continuing to meet on topic of flipped classrooms</li> </ul> | <ul style="list-style-type: none"> <li>• Participants invited to complete expression of interest survey to meet</li> <li>• Created online site with course management tool</li> <li>• Created Doodle Poll to set first meeting date/time</li> <li>• Identified article to share with faculty</li> <li>• Invited faculty to review &amp; share experiences, identify needs/interests</li> <li>• Identified best meeting setting</li> <li>• Considered facilitation strategy/agenda</li> </ul>                          | <ul style="list-style-type: none"> <li>• Welcomed participants</li> <li>• Provided context for coming together, working agenda</li> <li>• Clarified facilitator and group goals</li> <li>• Invited round of introductions</li> <li>• Recorded highlights from discussion</li> <li>• Facilitated dialogue</li> <li>• Summarized conversation highlights and asked for priority items for future meetings</li> </ul>                   |

| Follow-up  | How did it go? Impressions  | Evidence/Impact   | Link to Philosophy   |
|--|---|---|--|
| <ul style="list-style-type: none"> <li>• Sent email summarizing highlights of conversation with additional resources and suggestions for who else to consult with</li> <li>• Added note to calendar to follow-up on progress; timing based on outcomes of conversation</li> <li>• Made note of meeting in consultation log</li> <li>• Reflected on experience</li> <li>• Made notes for potential future consultation</li> </ul> | <ul style="list-style-type: none"> <li>• Positive and authentic tone of conversation</li> <li>• Conversation facilitated documentation of values and instructional practices (emailed to professor)</li> <li>• Instructor sent a follow-up email identifying how much she got out of the conversation and next steps/timing</li> </ul>  | <ul style="list-style-type: none"> <li>• Instructor requested feedback on created materials</li> <li>• Instructor attended other centre events (positive experience)</li> <li>• Email of thanks from professor</li> <li>• Professor requested consult based on previous interactions with me</li> </ul> | <ul style="list-style-type: none"> <li>• Situate practice in the literature</li> <li>• Respect and support needs of individual – start where they are at</li> <li>• Talk less, listen more</li> <li>• Create a setting that invites conversation</li> </ul>                                |
| <ul style="list-style-type: none"> <li>• Sent email with summary of conversation highlights and desired next steps</li> <li>• Identified potential faculty to co-chair future meetings with support of teaching centre</li> <li>• Updated online site</li> <li>• Set-up Doodle for next gathering</li> </ul>   | <ul style="list-style-type: none"> <li>• Strong showing (14) from three Faculties</li> <li>• Genuine sharing of needs, interests, experiences – everyone contributed to the conversation</li> <li>• Future topics of exploration identified</li> <li>• Expression of interest by group to continue to meet</li> <li>• One faculty forwarded course materials to share on website without prompting</li> </ul> | <ul style="list-style-type: none"> <li>• Online CoP site created</li> <li>• Continued interest of group to meet</li> <li>• One faculty member expressed interest in co-chairing CoP</li> <li>• Building ongoing connections and community vs. one-off event without follow-up</li> </ul>                | <ul style="list-style-type: none"> <li>• Facilitate peer-to-peer based learning</li> <li>• Broker relationships</li> <li>• Provide opportunities for faculty to network, exchange ideas, explore collaborations, create community</li> <li>• Situate practice in the literature</li> </ul> |

*Note.* Adapted from “Reflecting on and Documenting Your Activities as a Developer,” J. L. McDonald, 2015. Retrieved from <http://www.stlhc.ca/wp-content/uploads/2013/04/Reflecting-on-and-Documenting-Your-Activities-as-a-Developer-for-web.pdf>. Adapted with permission.

*Acknowledgement:* We wish to thank the 2015 EDC Institute participants who offered feedback on the table that led to its refinement.



#### 4. Educational development innovations and leadership.

This portion of your portfolio provides an account of your educational development innovations and leadership at the individual, institutional, and sector levels, including a narrative statement that justifies engagement in these particular activities. These accounts can be linked to evidence of impact, and/or reflections on what worked well and any intended changes.

Consider including:

- policies you have had a role in shaping
- initiatives you led and/or are leading
- curriculum you have developed or revised
- processes you have created/facilitated
- evidence of informed risk-taking
- invited presentations
- software you have developed
- technologies you have employed
- collaborations within and outside your centre and/or institution
- demonstrated leadership in your region

#### 5. Contributions to the educational development community and engagement in the scholarship of educational development, curriculum practice, and/or teaching and learning.

In this section, you supply an overview of your engagement in scholarly inquiry and dissemination related to educational development, curriculum development, and/or post-secondary teaching and learning (e.g., conference presentations, publications, other forms of scholarly knowledge mobilization).

Consider including:

- a list of educational development publications
- research projects in which you are or have been involved
- successful grant proposals
- a list of journals, conferences, and grants for which you have served as a reviewer
- service on committees
- conferences organized within and beyond your own institution
- mentorship you have provided to other educational developers
- membership in educational developer organizations

**6. Professional development activities.** This section focuses on descriptions of your own growth and evolution as an educational developer - past, present, and

future (refer to Chapter 3). We recommend including illustrative examples to anchor and communicate what you have learned about the field of educational development and yourself. This section presents an opportunity to reflect on any critical learning experiences that have shaped your work and practice.

Consider including:

- conferences and workshops you have attended and a brief description of how you are applying what you learned; other measures you have taken to enhance your practice
- short-term and long-term educational development goals
- annual reviews of your goals and performance with plans for the future

**7. Teaching experience.** In this section, you furnish an account of your post-secondary (or other) teaching experience and a description of how these experiences shape and inform your educational development practice. Your teaching may be inclusive of courses you teach in formal academic programs; the instruction and facilitation of workshops and short courses offered through your centre to faculty, teaching assistants, and others; and/or other kinds of teaching (e.g., non-credit) within and beyond your college, university, or institute.

Consider including:

- list of courses you have taught or are teaching
- link to your digital teaching portfolio and/or your teaching philosophy statement
- video evidence of skills in action
- sample lesson plans and prepared learning materials (e.g., worksheets)

**8. Evidence of effectiveness and impact.** This portion of your portfolio provides an overview of the methods used to measure the impact of your work at the individual, institutional, and/or sector level. This section will include formative and summative feedback and evaluations related to the effectiveness and impact of your practice.

Consider including:

- written comments about your work and performance from people you have consulted with, workshop participants, colleagues, employers or others
- list of honours, awards or nominations along with an explanation of why you were selected



- list of invitations to contribute to educational development initiatives outside of your unit
- summary of quantitative and qualitative data related to effectiveness and impact of educational development activities (e.g., workshop evaluations, long-term impact studies, case studies, program reviews)
- communications related to educational development activities and initiatives (e.g., internal newsletters, blog posts that highlight scope, quality and impact of practice)

**9. Appendices.** The appendices are a space in which to incorporate carefully selected materials that support your narrative. As your portfolio evolves or you move it from a paper-based to an online format, appended items will change also. Strive to include only those items that are essential to the purpose of your portfolio and check that there is coherence and alignment between your philosophy, narrative and appendices. Seldin et al. (2010) caution that when building a portfolio, some individuals let their appendix files determine the portfolio narrative. To prevent this from happening, they suggest that portfolio creators first reflect on their philosophy, then describe why they adopt particular strategies and methodologies; only after these steps are complete should they select items that provide evidence of their accomplishments and activities (see Tables 4.2 and 4.3).

There is no prescribed formula for preparing your portfolio or selecting its contents (Stanley, 2001). What you include and how you structure your portfolio is largely an individual choice. Though some employers may request particular elements to be included, you will be the one who determines how to authentically represent your contributions to the practice, leadership, and scholarship of educational development.

## The Benefits of Collaboration

Though each portfolio is individualized and the owner shapes its creation, there are many benefits to collaborating and consulting with others as you prepare and revise your portfolio (Seldin et al., 2010).

For one, collegial support can help you commit to finishing and/or revising your portfolio, when so often it can fall to the bottom of your “to do” list. In this respect, colleagues can be invaluable in motivating you to stay accountable and to devoting time to your portfolio. Some of the authors of this guide meet virtually, one hour a month, to revise their own portfolios. Were it not for that time or the commitment made to each other, they agree that their portfolios would have gone largely ignored most of the year. In addition to accountability, colleagues can also provide constructive feedback. As noted in [Chapter 2](#), a “critical friend” (Handal, 1999, p. 63) can offer valuable suggestions and perspective on your work. Table 4.3 provides a list of questions to ask yourself once a draft portfolio is prepared. Asking these questions in consultation with a colleague or critical friend may also be insightful.

## Conclusion

Educational developers (and those who engage in development work but who do not self-identify as educational developers) at all stages of their career can benefit from creating a portfolio and can use the ideas and tools presented in this chapter to advance their portfolio. We encourage you to identify the sections, prompts, and questions that compel you most and start there. [Chapter 5](#), with its focus on philosophy statements, and [Chapter 6](#) with further ideas on designing your portfolio, may be particularly helpful. Creating an integrated, comprehensive portfolio can be a daunting task. It is important to remember that your portfolio is an ongoing project that will need regular attention. However, as you think carefully about your purpose and audience, anchor your portfolio in your educational development philosophy, and strive for alignment, you will find the focus narrows and the process becomes achievable.

Table 4.3

*Checklist of Questions to Ask Once You Have a Draft Portfolio*

| Questions  |
|--|
| <ul style="list-style-type: none"> <li>• Does your reflective statement authentically describe your educational development philosophy, strategies and methodologies? (i.e., Does it represent your actual practice or just your aspirations?)</li> <li>• Does your portfolio clearly identify all of your educational development roles and responsibilities?</li> <li>• Have you included information on a range of activities that support or inform your educational development practice, leadership and scholarly contributions? Research, teaching, service on committees, and even activities you do outside your professional work may have an influence.</li> <li>• Have you included specific information on your short-term and long-term goals?</li> <li>• Have you addressed how your teaching and disciplinary focus inform and intertwine with your educational development practice?</li> <li>• Is there consistency and alignment between your educational development philosophy, your narrative and reflections, and the evidence presented throughout your portfolio?</li> <li>• As relevant, have you included photographs, podcasts, recordings, images, charts, tables, or other figures in your portfolio to summarize the scope, quality and impact of your practice? (<a href="#">see Chapter 6</a> for packaging and presentation ideas)</li> <li>• Have you provided evidence of the impact and effectiveness of your practice across multiple perspectives and data sources?</li> <li>• Is the majority of the information and data in your portfolio current or from the recent past?</li> <li>• Is your portfolio well-organized and well-presented from the reader's perspective?</li> <li>• Have you invited a peer to provide you with feedback?</li> </ul> |



# Chapter 5

## Preparing an Educational Development Philosophy Statement

### What is an Educational Development Philosophy Statement?

As the field of educational development continues to evolve (Fraser et al., 2010; Gibbs, 2013; Timmermans, 2014), the importance of providing evidence of the scope, quality, and impact of our practices becomes ever more compelling (see Chapter 2). Educational developer portfolios provide an opportunity for you to present an integrated summary of your philosophy, practices, accomplishments, and effectiveness. In doing so, your portfolio provides a powerful means to communicate the diversity and richness of your educational development approaches, as well as to present evidence of your influence and impact in post-secondary education (Wright & Miller, 2000).

Philosophy statements communicate a set of beliefs that motivate action (Jenkins, 2011). An educational development philosophy statement provides a foundation for your portfolio. Your philosophy statement should clearly communicate:

- what your fundamental beliefs are about educational development;
- why you hold these beliefs; and,
- how you translate these beliefs into your educational development practice.

The key claims made in your philosophy statement provide a framework for the presentation and alignment of evidence throughout your portfolio (Schönwetter et al., 2002; Wright & Miller, 2000). The following sections of this chapter guide you in structuring and preparing your philosophy statement, and provide sample philosophy statements.

### How Do You Structure an Educational Development Philosophy Statement?

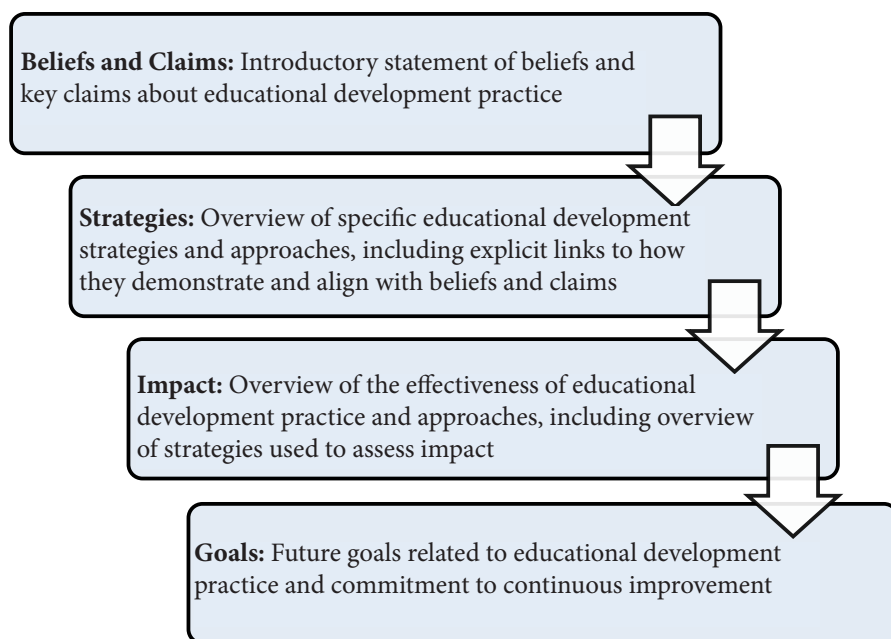
There is no single ideal format for an educational development philosophy statement. While philosophy statements are typically presented as a one to two page reflective summary, Schönwetter et al. (2002) acknowledge that this guideline for presenting a personal philosophy statement may be too restrictive. When preparing a statement, it is most important to consider and write with the intended audience and purpose in mind, whether it be for personal growth and career development, as part of a job application, for an honours and awards package, or as a component of performance review and evaluation. For example, the length and level of detail incorporated into a philosophy statement that is prepared as a stand-alone document for personal growth may vary from one that is incorporated into an educational developer's portfolio that is submitted as part of a job application. [Figure 5.1](#) and [Table 5.1](#) provide an overview of an example structure, as well as a summary of the key components of an educational development philosophy statement.

**Philosophy statement: Opening section – values and beliefs.** Educational development philosophy statements often begin with an introductory section that summarizes your values, beliefs, and assumptions about educational development and clearly presents the key claims that you make about your practices and approaches. Helpful points of reference when preparing this section may be Knight and Wilcox's (1998) discussion of ethics and effectiveness in educational development, the [POD Network's ethical guidelines](#) (POD Network, 2015), and the [EDC values](#) (EDC, 2015e). This introductory section should provide a link to why you hold these

beliefs based on personal experiences and scholarly literature related to educational development and post-secondary education. Wright and Miller (2000) highlight the importance of taking a scholarly approach to the development of an educational developer's portfolio, and the educational development philosophy statement provides an opportunity to describe how day-to-day practices are informed by theory and research. Gibbs (2013) also acknowledges that educational developers are becoming more explicit about the theoretical underpinnings related to their work. Purposefully situating an educational development philosophy statement in scholarly literature further substantiates claims made about your practice and approaches. It is important to ensure that your philosophy statement provides an authentic representation of your core beliefs and practices, and links to scholarship should not detract from the personal narrative that grounds your statement. As a means to position the philosophy statement in personal experience, your introductory section may also be grounded in a metaphor, quote, pivotal moment, or critical incident (Brookfield, 1995), which has substantially impacted your beliefs and understandings about educational development (Kearns & Sullivan, 2011; Schönwetter et al., 2002).

**Philosophy statement: Middle section – strategies and impacts.** The middle sections of the educational development philosophy statement provide an overview of specific strategies used in your practice that provide evidence of and align with the core assumptions and beliefs you hold about educational development. As philosophies are influenced and informed by contexts unique to each educators' work (Jenkins, 2011), this section should provide a personal perspective on your educational development roles and responsibilities, as well as on institutional/sector cultures and contexts that have informed those beliefs and practices (Fraser et al., 2010). It is important to highlight how and why your educational development strategies and approaches have developed and evolved over time based on experience. This section may also include a brief reflection on the effectiveness, impact, and influence of your educational development practices (on you, on your peers, on instructors or other program participants), and a summary of the methods

you use to evaluate the impact and influence of your practice.



*Figure 5.1.* Example structure for an educational development philosophy statement. Builds upon the framework and content presented by Kearns and Sullivan (2011) and Schönwetter et al. (2002).

**Philosophy statement: Closing section – goals.** The final section of an educational development philosophy statement most often includes a brief summary of the key claims highlighted throughout, as well as an overview of future goals as they relate to your continued growth and development as an educational developer.

Table 5.1 on provides a detailed summary of the key components of each section of an educational development philosophy statement highlighted above, with guiding questions for further reflection. By no means is this summary of the structure and key components of an educational development philosophy statement meant to be restrictive. Whatever the format, your philosophy statement should provide a first-person narrative that leaves the reader with a clear understanding of why you do what you do as an educational developer.

Table 5.1

*An Overview of the Key Components of an Educational Development Statement, Including Guiding Questions for Reflection*

| Educational Development Philosophy Statement Components  | Guiding Questions for Reflection  |
|--|---|
| <b>Definitions and beliefs about educational development:</b><br>beliefs, values, assumptions, and ethics about educational development and how they align with your educational development roles and contexts across various levels (e.g., individual, institutional and sector)                                 | <ul style="list-style-type: none"> <li>• What are my beliefs about educational development?</li> <li>• What do I believe about the role of educational development in post-secondary education?</li> <li>• What does 'good' educational development practice look like?</li> <li>• Why do I hold these beliefs?</li> <li>• Who or what has most informed my educational development approaches?</li> <li>• How have my beliefs and approaches been informed by my various roles, experiences, and responsibilities within an individual, institutional and/or sector context?*</li> </ul> |
| <b>Educational development roles, methods and strategies:</b><br>personal strengths, skills, goals and expectations related to the diverse roles and contexts of educational developers in post-secondary education, and overview of views of effective educational development strategies, practices, and methods | <ul style="list-style-type: none"> <li>• What are my key strengths and skills as an educational developer?</li> <li>• What are some of my accomplishments?</li> <li>• What educational development strategies do I use?</li> <li>• How and why have my educational development approaches evolved over time?</li> <li>• How do my actions and strategies align with the beliefs, values, and claims I make about educational development?</li> </ul>  |
| <b>Impact:</b><br>strategies used to evaluate educational development practices and effectiveness, including impact/influence on educational practice  | <ul style="list-style-type: none"> <li>• What difference have I made, and how do I know?</li> <li>• What has been the impact and influence of my educational development practice, research and leadership (on myself, educators, other educational developers, the larger institutional and academic community)?</li> <li>• What methods do I use to evaluate the impact and influence of my educational development practice?</li> </ul>  |
| <b>Future Goals:</b><br>future goals related to your educational development practice that demonstrate a commitment to continuous improvement  | <ul style="list-style-type: none"> <li>• How will I continue to develop and improve as an educational developer?</li> <li>• How are my future goals and aspirations related to my educational development practices and roles?</li> </ul>   |

\*see Fraser et al. (2010)

*Note:* Builds upon examples and frameworks presented by Kearns and Sullivan (2011), Seldin et al. (2010), and Schönwetter et al. (2002).

# How do you Prepare an Educational Development Philosophy Statement?

Creating an educational development philosophy statement is a complex and evolving process that takes time. Although it can often feel overwhelming at the start of the process, the guiding questions provided in [Table 5.1](#) can provide a good starting point to reflect on your beliefs, practices and approaches. The SOAR (Strengths, Opportunities, Aspirations, Results) framework (Stavros & Hinrichs, 2011; Stavros, Cooperrider, & Kelley, 2003) can provide a helpful reflective prompt. [Table 5.2](#) presents a SOAR process that has been adapted within the context of developing an educational development philosophy statement. Grounded in appreciative inquiry (Mills, Fleck, & Kozikowski, 2013), the SOAR framework and guiding questions provide you with an opportunity to reflect upon and summarize your educational

development approaches. You may wish to ask colleagues, peers, and educators to engage in a discussion based on these questions, as it can be illuminating to hear others’ points of view related to your key strengths, claims and approaches to practice.

As Schönwetter et al. (2002) attest, preparing a philosophy statement involves a complex process of “gathering, assimilating, analyzing, reflecting upon, evaluating and adapting” your thoughts related to why you do what you do in practice (p. 84). It is critical that your philosophy statement includes a strong personal voice that is grounded in your unique roles, responsibilities, experiences, and contexts as an educational developer. Your personal identity and story should have meaning and resonance for you and for your readers. Hence, reflecting upon and articulating how specific moments and experiences have helped shape your approaches to practice can be particularly

Table 5.2  
*The SOAR Framework*

| Strengths   | Opportunities  |
|---|--|
| <ul style="list-style-type: none"> <li>What are your greatest skills, capabilities, and strengths as an educational developer?</li> <li>What do you provide and do in your role as an educational developer that is of benefit to others?</li> <li>What have been some of your greatest accomplishments as an educational developer?</li> <li>What are you most proud of in your role as, and approaches to educational development?</li> <li>When have you felt most engaged and affirmed in your educational development practices and approaches?</li> <li>What knowledge, skills, abilities set you apart as an educational developer?</li> </ul> | <ul style="list-style-type: none"> <li>What opportunities do you see for yourself as an educational developer?</li> <li>What are some of your greatest areas of interest in educational development?</li> <li>What opportunities currently exist that you can respond to in your role as an educational developer?</li> <li>What do you see as your greatest opportunities for growth in your educational development practice?</li> <li>What new skills and abilities will help you move forward in your educational development practice?</li> </ul> |
| Aspirations   | Results  |
| <ul style="list-style-type: none"> <li>What do you care most deeply about in your role as an educational developer?</li> <li>What are you deeply passionate about as an educational developer?</li> <li>What difference do you hope to make as an educational developer?</li> <li>Where do you hope to go in the future?</li> </ul>   | <ul style="list-style-type: none"> <li>How do/will you know you are succeeding in your practice as an educational developer?</li> <li>What projects and initiatives will you engage in as an educational developer that respond to the strengths, opportunities and aspirations identified?</li> <li>What tangible results do you hope to be known for in your role as an educational developer?</li> </ul>  |
| Based on these reflections, what are 3 key claims that you would make about your educational development practice?  |  |
| 1.<br>2.<br>3.  |  |

Note. Based on Stavros and Hinrichs (2011) and Stavros, Cooperrider, and Kelley (2003).



impactful. The process of preparing a philosophy statement involves an iterative and continuous cycle of reflection, assimilation, evaluation and articulation of your educational development beliefs, assumptions, and practices. Ultimately, you should make your implicit beliefs, ethics, assumptions and practices explicit through your educational development philosophy statement, and ensure that you clearly communicate what sets you apart as an educational developer.

## Sample Educational Development Philosophy Statements

The following section contains two sample educational development philosophy statements, which have been included in this chapter with permission from the authors. As highlighted above, there is no one ideal structure and format of an educational development philosophy statement. These statements draw on many of the key elements highlighted in the above discussion. After reading these statements, consider the following questions:

- What were some of the strengths of these educational development philosophy statements?
- What do you remember most about these educational development philosophy statements?
- How could these educational development philosophy statements be improved?
- Now considering your educational development philosophy statement, what do you want readers to remember most? What would you do differently?

### Sample 1: Dr. Erin Aspenlieder, University of Guelph, Ontario.

Erin Aspenlieder is an Educational Developer at the University of Guelph, Ontario. She holds a PhD in English and Cultural Studies from McMaster University. With eight years of experience (at the time of this guide's publication) in educational development, Erin has worked in areas of graduate student professional development, faculty and curriculum development, and the scholarship of teaching and learning. Her research interests include representations of teaching excellence, sessional instructors, and the intersection among graduate student teaching development, educational development, and neoliberalism in higher education. She initially prepared this philosophy statement in 2013 for the twin purposes of personal reflection and continuous improvement as an educational developer

and acknowledges that it continues to be reworked and revised.

Dr. Erin Aspenlieder, Educational Developer, University of Guelph, Ontario

### Educational Development Philosophy Statement

Educational developers share a common interest in change: change that will enrich teaching and learning environments and experiences. My role is to create and contribute to the context in which this change is possible. While the approaches I take are guided by the specific contexts and the individuals and groups I collaborate with and support, I act with integrity when I follow and model consistent principles of empowerment, entrepreneurialism and inquiry.

### *Empowerment*

Rather than seeing my role as educational developer as the gatekeeper of teaching skills or scholarship, my practice begins with respect for the curiosity of the individual and recognition of the expertise that emerges from their experience.

At the same time, I am an expert in teaching and learning. Educational developers, overly wary of teleological models of development that have “unexamined assumptions about the direction, purpose and goal of development” (Webb, 1996, p. 64) risk minimizing their expertise. As with much in educational development, a balance must be struck between respect for experience and depth of evidence. Empowerment reaches such a balance. In creating opportunities for individuals and groups to learn to teach others, to ask and answer questions, and to seek support when they reach limits, I build relationships of reciprocity, not reliance.

In practice, this principle is evidenced in my commitment to peer-based programs that empower individuals and groups to be catalysts for change by teaching them so they might teach others. My work at the University of Guelph in initiating and developing peer-based programs like the Instructional Skills Workshop, the Peer Consultation Program, and the Peer Feedback Program reflect my commitment to empowerment. Moreover, the work I do in teaching graduate students the theories and practices of teaching seeks to empower a generation of scholarly teachers who will go on to lead institutional and national change in teaching and learning cultures.

One place these broader changes in culture occur is in the difficult-to-measure spaces of conversation. An important part of my empowerment approach to educational development is conversation, particularly dialogic conversation - “a community-building form of conversation, creating a conscious collective mindfulness [that] recognizes the importance of multiple perspectives and opinions” (Taylor, 1999). I facilitate conversations that do not seek to persuade or cajole, but rather to explore and imagine. For instance, the community conversations around the purpose of higher education that I stimulated in The Learner Centred Project and in my publications, aim to empower each individual on campus and in the country to be able to explain the value of higher education and their role within it. While my work in initiating Communities of Practice and organizing the Graduate Student University Teaching Conference brings people together to talk about ideas and issues important to them.

### *Entrepreneurialism*

Despite, or perhaps because of, this interest in the philosophical purpose of higher education, I also work to create change in pragmatic and opportunistic ways. In his description of the orientation of educational developers, Ray Land describes this pragmatic approach as one “strongly project-driven, both internally and externally” (p. 44). I expand on this understanding of project to include problem driven. I believe one of my responsibilities as an educational developer is to respond to the challenging context of higher education not simply with conversation and empowerment, but with a commitment to generating and implementing solutions.

The innovative Inquire Certificate [a graduate certificate in the scholarship of teaching and learning] I collaboratively developed is an example of such a pragmatic approach. Identifying a national need for a program to bring graduate students into the scholarship of teaching and learning, we saw an opportunity to address this need through the creation of a geographically flexible, interdisciplinary program in the form of a collaborative, inquiry-based, blended-learning curriculum. The program addresses a problem in a pragmatic, yet imaginative, way and exemplifies my project-focused, problem-solving approach to educational development.

Similarly, curriculum development is a, perhaps unexpectedly, entrepreneurial opportunity for educational developers. Hardly a revenue source,

curriculum projects are resource intensive; however, curriculum is an opening through which this, albeit opportunistic, educational developer can not only access departments and teaching and learning leaders, but can also advocate for learner-centred approaches to the curriculum. Such high-stakes projects like the Engineering Learning Outcomes and Assessment Project or the NCAT Course Redesign come with risks, but they come, too, with tremendous possibility for impact and change. Recall the over-arching goal of my practice: to create the conditions under which change can occur that will enrich teaching and learning environments and experiences. Curriculum projects are ideal opportunities to make high-impact, lasting change for those entrepreneurial enough to see problems as possibilities.

### *Inquiry*

Seeing problems as possibilities may well be the function of higher education. I approach my work with the awareness that research is not only a respected currency in higher education, but also the stuff of excitement, curiosity and passion. So it is that as an educational developer I value self-directed inquiry in teaching and learning in higher education. I value it because it not only develops cognitive skills, content knowledge and individual/group autonomy (Guglielmino, 2008), but also anticipates specificity, requires conversation and respects experience.

So how does this belief manifest itself in my practice? Similar to Savery’s observation that “in an inquiry-based approach the tutor is both a facilitator of learning and a provider of information” (2002, p. 16) I perform dual functions in my role: I draw attention to the cognitive skills at work in approaching a teaching and learning question while also offering curated resources that might support further thinking. For instance, in an individual consultation I might begin with a question like “what brings you here today?” and after the individual narrates his or her experience I might pause the discussion to facilitate meta-cognition by drawing attention to the individual’s engagement in critical reflection. After discussing the skill of reflection, I turn to the specific question by suggesting resources to read or watch, other people to talk to, or strategies to experiment with. More directly, my practice is consciously inquiry based in that it is evidence based in the sense that I explicitly reference the scholarship of teaching and learning in workshops, programs and consultations. In a hyperconscious way my work is inquiry driven in that I am engaged in

researching my practice even as I participate in it. My research straddles evaluating the assumptions and impact of the work that I do and investigating the discourses of higher education and those who navigate its terrain.

In a higher education context marked by increased demands for access, transferability and accountability, educational developers are critical to facilitating change that will enrich teaching and learning environments and experiences. By communicating this core set of principles I can not only feel confident that my decisions are ethically motivated and implemented with integrity, but those I work with in advancing change in higher education can confidently identify me as a source of positive and unwavering support.

As with all my work, the personal and textual conversations I have participated in have shaped my understanding of my role and responsibilities as an educational developer. I look forward to this philosophy statement evolving as these conversations continue to deepen and enrich this understanding.

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### Sample 2: Dr. Natasha Hannon, Niagara College, Ontario.

Natasha Patrito Hannon is the Manager of Educational Development at Niagara College, Ontario. She holds a PhD in Chemistry from Western University. With nine years of experience (at the time of this guide's publication) in educational development (seven in Western University's Teaching Support Centre and two in her current role at Niagara College's Centre for Academic Excellence), Natasha has worked in areas of graduate

student professional development, science education, faculty and curriculum development and the scholarship of teaching and learning. At the time of publication of this guide, Natasha was co-editor of the Teaching Innovation Projects Journal and co-Chair of the Council of Ontario Educational Developers. She prepared this philosophy statement in 2015 as a tool to reflect upon the evolution of her educational development practice in light of her transition from the University to the College sector.

Dr. Natasha Patrito Hannon, Manager of Educational Development, Niagara College, Ontario  
Educational Development Philosophy Statement

Educational development is transformative when it empowers educators and educational institutions with the skills and frameworks by which they can investigate, evaluate and exploit possibilities in teaching and learning. As the manager of an educational development unit at a community college, I am challenged to help faculty apply evidence-based curriculum development and instructional practices in new and sometimes unusual contexts. Each time I walk into a culinary laboratory, a hair-styling studio or a global marketing class at my institution, I am keenly aware that I have expertise to share but that I am not the expert. I support the faculty who teach in these unique contexts by creating spaces where they can critically reflect on their own teaching practice and share their ideas with others, where they can apply their evolving frameworks for learning in creative ways, and where they can test the limits of these frameworks by engaging with and contributing to the scholarship of teaching and learning.

### Establishing a Foundation of Trust and Transparency

Educational developers are institutional change agents. We are frequently called upon to lead initiatives and craft policy in areas such as technology-enabled learning, curriculum development, and the Scholarship of Teaching and Learning (Dawson, Britnell, & Hitchcock, 2010; McDonald & Stockley, 2008). These efforts sometimes challenge long-held assumptions and invite individual faculty, programs, and institutions as a whole to take risks – to expand their notions of what is possible in teaching and learning, to invest in innovative curricula, and to engage learners in more authentic and meaningful ways. By taking time to understand specific educational contexts and by respecting disciplinary ways of knowing, I build trust with faculty and administrators. This trust is a crucial precursor to honest dialogue

about and exploration of teaching and learning. In my curriculum development work, I use Appreciative Inquiry to help faculty articulate the core strengths of their program and to reveal unspoken assumptions about their discipline, their curriculum, and their students. Before engaging in any major curriculum renewal efforts, I gather available evidence from past program reviews and scholarly literature, I observe classes and I consult with faculty and students to gain as nuanced an understanding of their pedagogical needs and aspirations as possible.

Using these consultative strategies, I solicited input and feedback from key stakeholders to develop a Teaching Competency Framework that was formally adopted by Niagara College in Fall 2015. The process of developing this framework sparked new conversations about the role of critical reflection and continuous improvement and has helped to raise the profile of faculty Teaching Portfolios as an important means of archiving and communicating evolving teaching practices at our college.

The Niagara College educational development team relied on this Framework to help us arrive at our signature suite of faculty development programs and resources. The programming and resource development efforts of the ED team are strategically aligned to core skills and values articulated within this document. The explicit connections between the Teaching Framework and our programming assists us in communicating the value of these initiatives clearly and efficiently. As the work of the ED unit evolves, the competency framework will also serve as an important benchmark for our internal quality review and continuous improvement processes.

### *Building Networks to Enhance Teaching and Learning*

I am always inspired by the collective wisdom that exists within communities of educators. We all wrestle with the challenges of communicating complex ideas, engaging and motivating learners and posing effective questions, and much can be gained from sharing these experiences. Parker Palmer (1998) suggested that to grow as teachers, "...we must talk to each other about our inner lives -- risky stuff in a profession that fears the personal and seeks safety in the technical, the distant, the abstract." I have worked over the past year to establish peer-driven programs like the Instructional Skills Workshop, Teaching Circles, and Communities of Practice as core faculty development initiatives at Niagara College.

Faculty from across our Schools have embraced these opportunities, engaging in meaningful dialogue about teaching and learning as individuals and within program teams. These initiatives are helping to break down disciplinary barriers, highlight effective learning experiences across the college, reduce faculty isolation and spark creative solutions to instructional challenges.

My own practice has also benefitted tremendously from the perspectives of trusted colleagues within the educational development community. I seek opportunities to connect members of our Educational Development team with peers across Canada. Supported by a 2015 EDC grant, Louise Chatterton-Luchuk and I launched a formal, cross-Centre mentorship initiative between the Academic Excellence units at Niagara and St. Lawrence Colleges. Through this project, staff at both Centres share processes, programs, and resources developed at each institution in order to refine practices and build on each other's successes. We are also developing a virtual 'handbook' to support inter-institutional, network-based mentorship among other educational developers. The resulting community-building activities, meeting schedules and formats, guiding questions, and reflection templates will be collated and shared widely with the ED community.

### *Expanding Circles of Influence*

Too often, the processes by which we investigate learning or develop ourselves as teachers and the products of these efforts are ephemeral. According to Boyer (1992), "...the work of the professor becomes consequential only as it is understood by others... When defined as scholarship, teaching both educates and entices future scholars." I am proudest of the work that I have done to create platforms for the dissemination of teaching and learning inquiry. In 2011, I founded the Teaching Innovation Projects Journal (TIPS), an open-access, peer-reviewed resource that publishes articles by graduate students and postdoctoral fellows. These articles describe the scholarly and pedagogical foundations for workshops about contemporary questions in teaching and learning. The rich body of TIPS resources are free for use or adaptation by all members of the higher education community. Students and fellows from numerous universities across Canada have contributed to the journal and their articles have been downloaded over 40,000 times by educators in more than 30 countries. I am also a founding organizer of the Western Conference on Science Education.



In three iterations of the conference, over 500 post-secondary educators from across Canada have gathered to share best practices, original research and emerging trends in science education. TIPS and WCSE have evolved into important and enduring vehicles by which faculty and students can propagate the outcomes of scholarly teaching.

### Conclusion

As an educational developer, I care deeply about the success of the educators with whom I consult, and by extension the students with whom they work. I draw on the expertise of colleagues, fellow educational developers, SOTL scholars and my own creative capacity to establish, maintain, assess and share faculty and curriculum development initiatives that foster transformational learning. In my career, I have had the privilege to experience many moments of exceptional teaching and remarkable learning. It is my mission, as an educational developer, to ensure that those moments occur with increasing frequency and intensity across post-secondary education.

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## Conclusion

As educational development philosophy statements become more embedded into individual, institutional and sector practices, we will certainly learn more about how they are developed, how they are used, and perhaps, most importantly, how they inform and influence our approaches to practice. Ultimately, preparing an educational development philosophy statement is a reflective process that provides us with an opportunity to intentionally reflect upon and develop confidence in why we do what we do in our practice.

Educational developers embrace a critically reflective approach to fostering personal and professional growth and development (Timmermans, 2014). One of the most important things to keep in mind as you prepare your educational development philosophy statement is that it is not a static document. As your educational development experiences continue to grow, your philosophy statement will most certainly evolve, and it is imperative that you continue to examine your beliefs, assumptions and approaches to practice. Reviewing and revising your philosophy statement on an annual basis provides a wonderful avenue to demonstrate your commitment to critical reflection and to foster continual growth and development.

Chapters 1 and 2 provided an opportunity for you to reflect upon the evolution of educational development, while Chapter 3 provided you an opportunity to identify and situate your knowledge, skills, and experiences within an educational development career span. This chapter has provided a framework for capturing some of these reflections in the form of an educational development philosophy statement. In the next chapters, you will learn how to build upon your philosophy statement and provide evidence of the scope, impact and effectiveness of your practice through an educational developer's portfolio.

An educational development philosophy statement provides a foundation for your portfolio.

# Chapter 6

## Assembling and Packaging Your Educational Developer's Portfolio

This chapter provides guidelines and suggestions to help you assemble and think through the concrete organization and form of your portfolio, both hard-copy and electronic. The format of this chapter differs from the others in that it emphasizes the design and presentation of information. We encourage you to skim the chapter for ideas before finalizing your collection of materials, writing a portfolio narrative, and assembling the document as a whole.



## Collect Materials and Start Writing

If you have been putting off getting started, now is a good time to begin collecting materials and writing content for your portfolio. [Chapter 4](#) identifies potential artifacts to include as evidence and text you need to find or to write for suggested document sections. “The Materials to Include in Your Educational Developer’s Portfolio” checklist found in the [Appendix D](#) further provides prompts and reminders to spark your memory for relevant documents, examples, or experiences to either collect or describe in your portfolio.

## Confirm Your Purpose

Remind yourself of the portfolio’s purpose and content and organize accordingly. As other chapters in this guide have stated, the intended purpose of a portfolio sets the stage for its development. [Chapter 2](#) highlights various purposes for preparing a portfolio, including

- a job interview;
- progress review;
- development and growth;
- an award nomination; and
- various other formative, summative, and future applications.

## Determine Tone

Tone is communicated in writing; even the lack of expressive language communicates to the reader and is reinforced by all aspects of visual formatting. What overall tone do you want to set in your portfolio? In part, your answer will depend upon your audience and purpose. Keep in mind that your writing, organization, choice of fonts, and format all cumulatively communicate to the reader (Kiefer Lee, 2012). For example, do you wish the reader to see you as

- professional and businesslike;
- philosophical and reflective;
- innovative and creative;
- ethical; and/or
- friendly.

## Organize Materials for Various Purposes

Set yourself up for success as you assemble materials for your portfolio. The approach described is appropriate for hard copy and electronic files.

- **Make it easy for yourself.** Collect materials knowing you can select a subset of the best examples for the final portfolio. Materials you don’t currently use may be helpful at a later point.
- **Name and sort files to facilitate later access.** You might start filenames or folders with a date, by type of activity, or by whatever descriptor will assist with later recall. Taking time to organize materials, files, and filenames well in the first round will make subsequent updates to your portfolio simpler.
- **Develop a flexible process for ongoing development.** Regularly add to your collection of materials, knowing you will be able to locate them again later for a different purpose.
- **Identify suitable materials.** Scan “The Materials to Include in Your Educational Developer’s Portfolio” checklist referenced above for ideas. The lists presented are intended to prompt your memory for materials relevant to your current task.

**Organizational tools.** If you are working with paper-based materials, the following organizational tools may prove useful as you gather and categorize potential portfolio artifacts.

- File folders, named and labeled in paper form, are practical; coloured folders may be worthwhile as well.
- Coloured sheets of paper or heavier card stock can be used to temporarily divide groups of pages within hard-copy file folders.
- A working Master File such as a sectioned accordion folder may be helpful to group potential materials for inclusion.
- Sticky-notes can be used as working titles on folders and as temporary dividers as you group materials.

## Categorizing and Labelling Content

Sort materials and label portfolio sections with provisional titles. Create a set of paper or electronic folders for each major section of the portfolio and divide materials accordingly. Section titles should be information-bearing and front-loaded for meaning to set expectations as to what the reader will find (Loranger, 2015). Consider, for example, what information you learn from each of the following titles:

- a) Chapter 1
- b) The Beginning
- c) Early Years
- d) Education and Training

Each label communicates information to the reader, but Education and Training is probably the least ambiguous; it front-loads meaning and sets expectations of what you will find in the section labelled with this heading. Bear in mind how you wish to communicate and how you wish to be represented to the reader. For example, Education and Training: Early Years, front-loads meaning and softens the heading to a less resume-like tone.

**Common Headings.** A list of frequently used headings (see also [Chapter 4](#)) is provided below. You may wish to select from these options, change the sequence, combine some of the headings within a section or change headings altogether, just ensure you communicate appropriately for your audience (Loranger, 2015; Shneiderman & Plaisant, 2005).

- Educational Development Philosophy
- Roles and Responsibilities
- Teaching Experience
- Industry Experience
- Educational Developer Approaches and Methods
- Educational Developer Materials and Examples
- Innovations
- Leadership
- Contributions to the Educational Development Community
- Professional Development Activities
- Evidence of Effectiveness and Impact
- Appendices
- Other applicable headings

#### **Grouping materials: First take.**

- Group collected materials into the labeled file folders created above. Piles of paper might work, but they have a tendency to fall over and become messy particularly if pets or children are around.
- Use the Master File to sort those terrific materials or reflections that don't quite fit your current purpose. If the master file is well ordered in an accordion file (or in labelled folders on your computer) you will easily find materials and documents when needed.

## **Working with Electronic Files**

You may wish to create a table of contents as your first task prior to reorganizing the actual text, documents, and artifacts you have prepared or collected. Whether you plan to have a paper-based copy and/or an online version of your portfolio, print at least a skeletal outline of the document, with headings, to allow a review of the manuscript in hand. You may find your portfolio comes across quite differently in paper versus electronic form. You may also get a better sense of the length and bulk of the final document. Paper and online versions are likely to differ considerably in how they are formatted and packaged. The standard menu and click access of online documents does not always translate well when printed.

## **Format with Your Audience in Mind**

Just as the purpose of your portfolio sets the stage for its design, the audience plays a shaping role as well. Consider each of the following scenarios.

- **Reader's expectations.** Who is your anticipated reader? Consider whether they prefer, or may expect, a traditional paper or an online format of your portfolio. An interviewer may not take the trouble to go to the computer if it is the only point of access for your portfolio. For technology-related job interviews however, examples of online materials or documents may be expected, and will provide an opportunity to highlight your skills and abilities.
- **Author preferences.** Consider how you prefer to read or view online similar materials and whether your reader is likely to expect the same.
- **Forms of evidence.** If you have media files, audio files or visuals, you may wish to showcase choice examples. Images included in paper-based portfolios should be used selectively and purposefully. Media files will benefit from an online format, but should be viewable in short meaningful excerpts, directing the viewer's attention to features of interest. Your electronic portfolio, for example, is not the place for an entire online course. The viewer is unlikely to explore something lengthy and will appreciate seeing highlights, using links to directly explore areas of interest or excerpts provided.

Table 6.1  
*Review of the Draft Portfolio*

| Sequencing Your Portfolio: Questions to Consider   |
|--|
| <ul style="list-style-type: none"> <li>• Consider how someone unfamiliar with your materials might see them for the first time. Are they self-explanatory? Is there enough background information provided for materials to make sense? Do you need an explanatory sentence to provide context?</li> <li>• Is the document arranged thematically (e.g., roles, reflections, examples)? If so, how will you communicate this organization to the reader? What visual cues do you provide to keep them oriented?</li> <li>• Is the document arranged chronologically to show development? How will the reader know this?</li> <li>• Have you listed your most recent work first or last? Which do you wish to highlight? What is appropriate for your career stage and purpose?</li> <li>• Do you wish to convey what you have done, when it was done, or how it was done?</li> <li>• Do you wish to provide excerpts or callouts in text from your documentation (e.g., quotes from peer reference letters)? Will the excerpts or callouts make sense without the context of the full document? How might you provide context? What looks best in paper format versus online format?</li> </ul> |

## A First Review of the Draft Portfolio Sequence

Review the presentation of materials in each section of your portfolio. Order materials in a manner that makes sense to you and your intended audience. Once you have prepared the initial selection and arrangement of materials, ask yourself the following questions found in Table 6.1. From there, take another round at adjusting your portfolio content to improve readability.

### Explicitly Guide the Reader by Design

Depending upon your purpose, you will want to make it easy for the reader to look over your materials and easily find the sections they would like to review. This ease of navigation reflects well on you and communicates your ability to be clear and organized. Use visual cues, colour, and text as signposts to guide the reader. As Nielsen (2006) found in his eye-tracking studies of how people view websites, viewers scan web pages in an F-shaped pattern, spending more time viewing headings and navigation. The same in theory holds true for paper-based documents. Publishers of hard-copy books, for example, have long used headings to guide readers and direct their attention to key content. To help orient the reader and increase visual scannability of your paper-based portfolio, consider including the following elements (for online portfolios, refer to the Putting the Portfolio Online section found later in this chapter).

- a table of contents (especially if the document is long)
- page numbers
- headers and footers
- brief explanatory paragraphs at the beginning of sections
- consistent headings in a clear font
- use of a larger typeface or bold text
- callout boxes or visuals embedded in text
- dividers to orient the reader to what they will find in each section
- consistently placed formatting (e.g., simple clear headers or footers)

### Guide the Reader with Text

Hopefully by this point you have a working document divided into sections with supporting artifacts. Now ask yourself, how will I orient the reader of this portfolio? Placing a sentence or short paragraph in strategic locations in the portfolio will help orient the reader to the document and aid them in quickly honing in on sections of interest; this is a venerable graphic arts technique (Gage, 1920). Other ways to guide the reader with text are listed below.

- **Introduce the portfolio.** An initial introduction with basic information is helpful to orient your reader. Make it very brief and focus on the document as a whole. This is not a place to wax lyrical – just tell them how to make sense of it. If however the point of the document is personal growth, development and reflection, then by all means make it creative or contemplative. The introduction is the gateway to the document and may be a good place to set the desired tone. Think again about how you want to be represented; the portfolio should ring true.
- **Introduce yourself and the purpose of the portfolio.** The document will do the rest. Briefly determine, or notice, if you have a workable sequence (e.g., thematic, developmental, categorical) and how the document is organized. Is this what you intended?
- **Emphasize important elements.** Consider what you want to emphasize, and prioritize accordingly. If you are particularly proud of a skill or accomplishment, you may wish to highlight it and move it earlier in the document or position it more prominently in your online portfolio.
- **Make it relevant.** Think about your audience. What will interest them? Make it easy for the reader to find key material by placing it strategically in the document or online.
- **Changes in voice.** Some parts of the portfolio are best handled as concise summaries, for example, listing education and experience. Other sections of the portfolio call out for you to discuss how you work, and what you believe about the process of educational development. This approach provides an opportunity for your authentic voice and personality to shine through, and the reader to get a sense of who you are and what you value.

## Determine Portfolio Length

You can always collect more documents than you need, as long as you are prepared to include only what is required for your purpose, and file the others in your master file.

- For jobs, concise is often better. Highlight the skills, knowledge and abilities of greatest interest to your potential employer with enough, but brief evidence

to support your claims. Provide links to additional online material, but recognize that the employer may not follow up.

- For annual reviews, you will want to highlight recent accomplishments. You may choose to create a section for the most recent year under categories found elsewhere in your portfolio, or create a new one. Potential content may include:
  - an annual summary of activities and accomplishments cross-referenced to other relevant sections;
  - one-off events or activities;
  - an assessment of the impact and effectiveness of activities;
  - contributions to the scholarship of teaching and learning or educational development; and
  - recent professional development.
- Refer to [Chapter 4](#) for additional ideas on what to include, not to mention your educational developer position description, your centre's mission statement and reporting requirements, and any other factors relevant to your context.
- For personal development and growth, length is not an issue. Reflection is the focus, and a means to deepen and enrich insights and understandings about educational development and your individual practice. After reflecting on what you do and why, consider, and possibly summarise, what you have learned about yourself and the field. What, if any unexamined assumptions did you uncover? What conclusions would you draw? What plans do you have to follow up? Refer to [Tables 5.1 and 5.2](#) in [Chapter 5](#) for questions to guide the reflection process.
- For award nominations, consider not just what makes you competent, but also what makes you out of the ordinary. Speak from the heart, or let others speak for you. Be sure to check the award guidelines for page-length restrictions.

## Choosing a Paper or Online Format

While the portfolio traditionally takes paper form, putting your materials online can be very convenient for you and for your audience (Shneiderman & Plaisant, 2005). Preparing a paper and an online version of your portfolio provides the best of both worlds, but can be a fair amount of work to prepare. [Table 6.2](#) highlights

advantages and disadvantages of each format. Consider which option works best for you when creating (or revising) your portfolio. Once computer monitors are developed with the same luminosity of paper to eliminate eye-strain, readers may prefer to read online; until then, readers are more likely to prefer to read (and mark-up) text of any length in paper form, and will be frustrated if it is only available online. As noted previously in this chapter, format your portfolio and make available to others with your desired audience in mind

**Choosing a paper portfolio.** The paper-based portfolio

is tangible, portable, easy to skim, and easy to send. It has weight and can look very professional. Left with a possible employer, it is a tangible reminder. Note the following packaging aspects for different portfolio uses.

- **Make it flat.** For job interviews or meetings (e.g., performance, promotion, other) a spiral bound document allows you to open the portfolio flat without the risk of the whole thing disassembling or inadvertently flipping closed.
- **Concise.** For a job application, provide the essentials and make additional materials available electronically.

Table 6.2

*Advantages and Disadvantages of a Paper and Online Portfolio*

| Advantages  |  |
|---|--|
| Paper   | Online   |
| <ul style="list-style-type: none"> <li>• Traditional, many times expected</li> <li>• Easy to review without technology</li> <li>• Remains constant during review</li> <li>• Not influenced by changes in technology or differences in reviewer access</li> <li>• Easy to flip through sections during interviews</li> <li>• Easy to add/remove materials in binder format</li> <li>• Easy to get a sense of the whole</li> <li>• Not susceptible to computer glitches</li> <li>• Can be circulated electronically as a PDF</li> </ul> | <ul style="list-style-type: none"> <li>• Immediately accessible via a web link</li> <li>• Simultaneously available to multiple people</li> <li>• Shareware and freeware programs provides author control over who sees all or part of your portfolio</li> <li>• Can integrate multiple media formats (e.g., video, audio, text documents)</li> <li>• Can link directly to examples and between sections</li> <li>• Lots of room for material and depth</li> <li>• Examples can be pulled up during interviews or meetings</li> <li>• Adjustments can be made just-in-time</li> </ul>           |
| Disadvantages   |  |
| Paper   | Online   |
| <ul style="list-style-type: none"> <li>• Can be bulky and heavy to transport</li> <li>• Can come apart during interviews if not properly bound</li> <li>• Costly to duplicate and mail</li> <li>• Takes time to be delivered</li> <li>• Viewable only by one person at a time</li> <li>• May be sent to a prospective employer, but not reviewed</li> <li>• Multi-media artifacts (e.g., digital, three-dimensional) cannot be viewed, only referenced</li> <li>• Must be updated to maintain currency</li> </ul>                     | <ul style="list-style-type: none"> <li>• Unclear navigation may limit depth and breadth of viewership</li> <li>• May be time consuming to prepare and organize</li> <li>• Some technical knowledge and skill required for set-up</li> <li>• Open access necessitates regular attention (e.g., checking dead links, updating content)</li> <li>• Dated content, poor functionality and presentation may not reflect well on the author</li> <li>• Susceptible to technology glitches</li> <li>• Must check availability, and access across different platforms and operating systems</li> </ul> |



- **Consider a shorter and longer version.** As mentioned above, you might send a brief version of your portfolio for a job application and bring a more extended version to the face-to-face interview as additional evidence. You can also provide links to online materials before or after the interview for review; but remember you cannot make them read it.
- **Binding.** A binder is more practical for annual reviews and growth portfolios, allowing you to add and remove materials with ease.

Before binding your paper portfolio, refer to Table 6.3 and ask yourself the provided questions.

**Choosing an online portfolio.** An online portfolio is always available for viewing. You can share contact information with those who are interested in viewing it without mailing it or meeting face-to-face. You can also send links to specific sections if you wish. Various platforms are available to host your online portfolio. Websites such as [EDUCAUSE](#) can help you identify the latest trends and best methods in the field of educational technology and electronic portfolio design and adoption. You can also draw on the expertise of instructional technologists at your institution or company to help you locate open sources (e.g., Wordpress) and in-house tools that work best for you (e.g., functionality, user-friendliness, access, and management).

## Moving Your Portfolio Online

Materials available online have physical, navigational, economical, and interactive advantages (Shneiderman & Plaisant, 2005). One option is to post your portfolio online in PDF (portable document format) and share a link to it using cloud drives such as Dropbox, Google Drive or other open source and shareware tools that enable sharing. If you choose this approach, be sure to create a clickable Table of Contents for your reader to connect them directly to various parts of the portfolio. Applications such as Adobe Acrobat Pro have an online portfolio format tool that is quite straightforward and allows you to easily create PDF documents. Other online tools that are more dynamic in form, require greater attention to navigational and presentation elements.

### Clean, clear design.

- Clear headings allow users to hone in on relevant sections and enhance visual scannability (Nielsen, 1999)
- Sound navigation (buttons, tabs, left navigation) for each section of the portfolio facilitates user-friendliness (Lawrence & Tavakol, 2007)
- Tone and sequence are particularly important in an online environment (Kiefer Lee, 2012; Webb, 2010)

Table 6.3  
*Final Review of the Paper-Based Portfolio Before Binding*

| Questions to Consider Before Binding  |
|---|
| Once you have assembled a paper-based portfolio into a workable order, ask yourself the following questions, taking into account the intended purpose and audience of your portfolio.   |
| <ul style="list-style-type: none"> <li>• First Impressions. Does the text formatting and integrated visuals look professional or otherwise communicate the desired tone and message?</li> <li>• Scannability. Can the reader easily find key information and locate references to evidence for the claims?</li> <li>• Binding. What are your binding options? How might they limit or enhance engagement with the portfolio (e.g., staying together, flipping through sections, laying flat when open). If you are not sure of the binding options available to you, a quick trip to a print shop will provide current possibilities.</li> <li>• Length. Is the portfolio as designed suitable for its intended purpose (not too lengthy if for a job interview; 10-15 pages plus appendices)? Place additional materials into your Master File for later use.</li> <li>• Message. Does the portfolio communicate your intended message?</li> </ul> |
| Once you are satisfied with the final product, show it to one or more colleagues or a trusted friend for feedback. Make any final changes and only then have it bound.  |



- Content should be divided into readable chunks optimized for online reading (Lawrence & Tavakol, 2007; Nielsen 1999; Nielsen, 2006) and communicate the depth of the enclosed material such as file size. Longer documents prepared for hardcopy use, such as research papers, usually include the ability to print.

**Length.** On average, users read less than 20% of the content of the text on an average page (Weinreich, Obendorf, Herder, & Mayer, 2008), devoting roughly four seconds to each 100 words (Nielsen, 2008). A 1997 study found that readers are likely to skim, skip, or print passages more than two pages in length and read only if it is very interesting (Morkes & Nielsen, 1997). In terms of portfolio design for the online environment, breaking up materials is key.

A great deal of information can be provided online, but is best viewed and experienced when divided into topical readable chunks that are formatted specifically for online use, or designed to be printed. These best practices require a greater economy of words and clear organization. It does not mean breaking up very long passages into multiple pages, but rather dividing content by topic, a process known as chunking (Kilian, 1999).

**Interactivity and visuals.** Many tools for posting materials online include pre-set templates, consisting of a set of colours, text, and typefaces to choose from, to reinforce the character of your portfolio. Images can greatly enhance the tone of a portfolio as well. Always check the terms of use prior to including images from the web. Many images are freely available through creative commons license.

The online format is visual and interactive, making possible links to materials such as photographs from workshops, interactive elements, videos, podcasts, publications, or any other materials accessible online. Any link to interactive material should have a small thumbnail visual included and clear text indicating what users can expect to find upon clicking the image or the link, as well as some indication of length. Avoid flashy elements unless you have a good reason for their inclusion.

A few educational developers at various stages of their career have kindly agreed to provide access to their online portfolios. Sample home pages are provided below with permission. Browse through one or several to determine their purpose and to assess their design. Consider the tone communicated by each portfolio. Ask yourself:

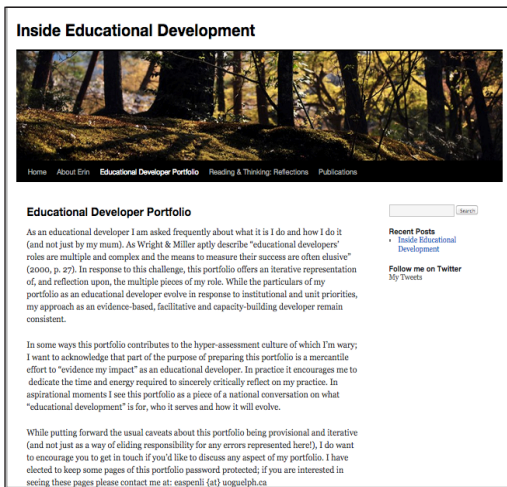
- What design elements influenced your response to each portfolio?
- How does the choice of font, colour, layout and images contribute to the portfolio's overall impression? How do these features orient the reader? What signposts do they provide to inform the reader of options available, and to guide their navigation?

## Navigation and the Key Questions

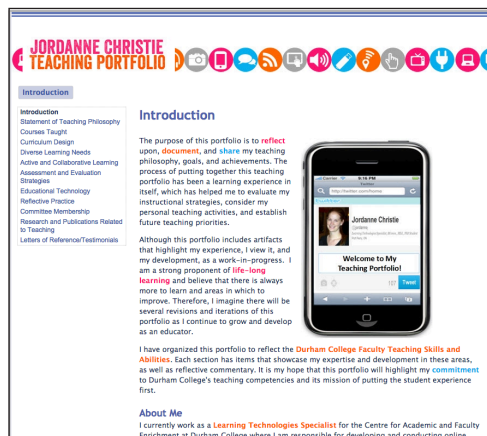
The online user experience literature suggests that when someone navigates to a webpage, they are most interested in knowing the answers to the following questions (Rosenfeld & Morville, 2002).

- Where am I? The user should know where they have arrived. Returning to the webpages shown above, would you know the answer? Note that the provided portfolio examples were developed for various types of portfolios. Headings are the electronic signposts.
- What can I do here? Once the user knows where they have arrived, the page should communicate its purpose. For example, Gavan Watson's page header clearly communicates what you will learn upon reading the text.
- Where can I go from here? Depending upon the purpose of the website, the page should communicate the scope of the portfolio. This is usually done with navigational links to the various sections of the portfolio as seen on Rebecca Lynn Taylor's page. Note that the navigational material is important to provide on subsequent pages as well. Links and buttons are signposts with integrated navigation.

Before going live, assess your portfolio using the questions outlined [Table 6.4](#).



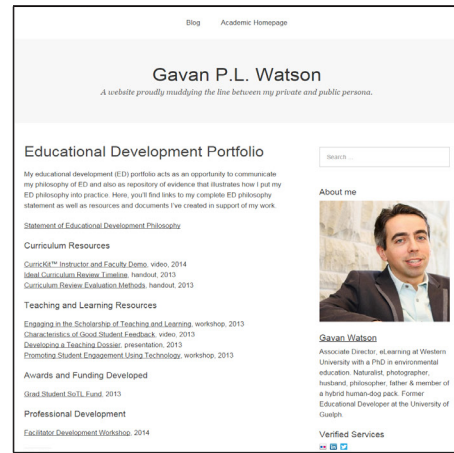
Erin Aspenlieder, University of Guelph



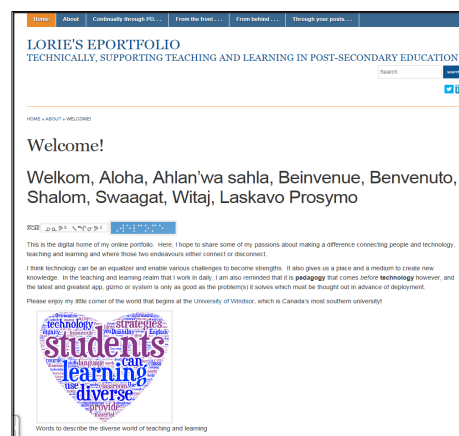
Jordanne Christie, Durham College



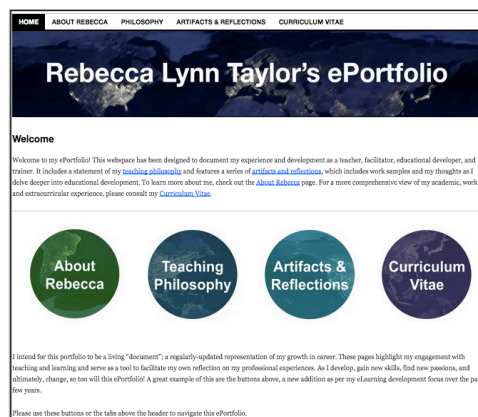
Judy Chan, University of British Columbia



Gavan Watson, Western University



Lorna Stolarchuk, University of Windsor



Rebecca Taylor, Canadian Memorial Chiropractic College

Figure 6.1. Sample Portfolios. Reprinted and linked with permission.

# Parting Thoughts

This chapter provided general and specific guidelines and considerations for organizing, assembling and packaging your portfolio materials in hard-copy and electronic formats. Page restrictions limit the provision of more specific examples of how to display content in an online environment or summarize insights from the e-portfolio literature. Links to full portfolios and excerpted materials, however, can be found online at the [EDC](#) website under the Educational Developer's Portfolio guide homepage. We invite you to take a closer look at these portfolios to inform your own.

The next chapter ([Chapter 7](#)) guides you in assessing the content of your portfolio, while the concluding chapter ([Chapter 8](#)) offers some personal insights of the portfolio creation journey.

Table 6.4  
*Final Review of Portfolio*

| Questions to Consider Before Going Public   |
|---|
| Once you have created your online portfolio, consider the following, taking into account the intended purpose and audience.   |
| <b>First Impressions</b> <ul style="list-style-type: none"><li>• When you arrive on the website's landing page, does the visible portion of the screen answer the key questions of "where am I?", "what can I do here?", and "where can I go?" without scrolling? Do all pages of major sections answer these same questions?</li><li>• Appearance: Do typefaces, images, and text convey the intended tone and impression?</li><li>• Scannability: Can the reader easily find key information, and link to evidence for the claims?</li><li>• Compatibility: Does the portfolio display properly in different browsers, and on different operating systems (e.g., Mac and PC)?</li></ul> |
| <b>Navigation</b> <ul style="list-style-type: none"><li>• Are the major and minor sections of the portfolio clearly labelled and visually distinct?</li><li>• Do all the links work, and are they hosted in a location not likely to change soon?</li><li>• Is the length suitable for the purpose?</li><li>• Does the portfolio communicate the intended message?</li></ul>  |

If you are content with the results, share your portfolio with one or more colleagues or a trusted friend for feedback. Make any changes and only then make the final version public.

# Chapter 7

## Assessing Educational Developer Portfolios

### Introduction

Educational developer portfolios are developed and used for a variety of purposes (see Chapter 2), which influences the way that they are assessed. A key purpose for creating an educational developer's portfolio is formative – for self-reflection and to advance one's personal and professional development (Stanley, 2001; Wright & Miller, 2000). For the purpose of formative feedback, self-assessment, collegial discussion and peer feedback on the portfolio's strengths and opportunities for improvement can be very helpful. Educational developer portfolios also provide an important opportunity to present evidence of the scope, impact, and quality of one's educational development approaches within the context of summative evaluations, such as during hiring processes and performance reviews (Wright & Miller). For educational developers who hold faculty appointments, portfolios provide a valuable opportunity to present evidence of the breadth and richness of their roles and responsibilities, which may otherwise be difficult to evaluate within the scope of established institutional tenure and promotion processes.

The following chapter provides a framework for assessing and providing feedback on educational developer portfolios. Specifically, it offers

- an overall summary of the key requirements for assessing educational developer portfolios;
- a conceptual assessment framework; and finally,
- two sample rubrics to guide the assessment process, both for formative and summative purposes.

The requirements, framework, and rubrics presented in this chapter should be adapted to help inform a variety of contexts, whether it be within a formative context such as self/peer evaluation and feedback; or for summative

processes, such as hiring, performance review, and awards programs. Within a formative context, one may be seeking feedback on the overall question, "How successful is my portfolio in communicating and providing evidence of the scope, quality and effectiveness my educational development beliefs, strategies and approaches?" When a portfolio is used to make a summative decision, such as hiring, performance reviews, award programs, or tenure processes, then specific criteria related to the job requirements, award criteria, and tenure policies would figure importantly in the review process. Here, the assessment will focus primarily on the overall question, "To what extent does the applicant meet the stated performance criteria, given the quality of evidence provided in the portfolio?"

### Requirements for Assessing an Educational Developer's Portfolio

Stanley (2001) describes portfolios as highly individualized and difficult to assess. She advocates for the inclusion of some standard elements in educational developer portfolios such as an educational development philosophy statement and evidence of one's contributions and argues that peer review should be a core component of the assessment process. We acknowledge that the process of assessing educational developer portfolios is still evolving. As a starting point, we have adapted Seldin's (1993); Seldin et al.'s (2010) and Stanley's key requirements for assessing portfolios below:

**Practicality.** The portfolio should be accessible, convenient and useful to evaluators. It should be easy to read, interpret, and evaluate. When portfolios become excessively long and complex, they become difficult to navigate and interpret. Most recommend that portfolios



be limited to a 10-15 page narrative, accompanied by an appendix, which includes complete examples of evidence that has been cited and summarized within the narrative. (Note: when considering an ePortfolio, ensuring clear navigation and a concise narrative becomes equally important as described in Chapter 6.)

**Relevance.** The portfolio should contain carefully selected evidence that links clearly to the roles, responsibilities, experience, and contexts of educational developers. Evidence provided should be relevant to, and align with, the key claims made about effective educational development practices and approaches, and to the portfolio's intended audience and purpose. For summative purposes, evidence should have relevance to the specific performance criteria identified (e.g., job requirements, performance management and award criteria, tenure and promotion policies).

**Acceptability.** Beyond the scope of the individual portfolio, Seldin et al. (2010) acknowledged that in order to effectively assess and evaluate portfolios, larger processes and procedures related to their value, use, and assessment must be in place. Specifically, for evaluation processes to be effective, the value and appropriateness of portfolios in providing evidence of the scope, impact, and quality of educational development practices and approaches, must be established. This may include departmental, centre, and institutional procedures related to incorporating portfolios effectively into hiring, retention and performance review processes. It may also include encouraging individual training for reviewers and review committees, such that they are able to effectively make judgements and decisions related to the expertise and experiences of individual educational developers within the context of a portfolio.

**Scholarly approach.** Although not presented as one of Seldin's (1993) or Seldin et al.'s (2010) key requirements, Wright and Miller (2000) emphasize the importance of the scholarly aspects of educational development work, and propose this should be an explicit component of educational developer portfolios. In addition to summarizing your engagement and support for the scholarship of teaching and learning and/or the scholarship of educational development, the educational developer's portfolio provides an important avenue to highlight how your approaches are informed by theory and research. As highlighted in Chapter 5, these links are often first presented in your educational

development philosophy statement. Additional citations to key scholarly works may also be made throughout the portfolio as a form of evidence to further substantiate your claims and practices.

## Framework for Assessing an Educational Developer's Portfolio

Figure 7.1 presents a summary of a conceptual framework to guide the assessment of an educational developer's portfolio based on four components: Philosophy, Evidence, Alignment, and, Reflection and Expression. This framework provides a foundation to help guide the review process for educational developer portfolios within a variety of formative and summative contexts (e.g., self/peer assessment, hiring, performance management, and awards). It has been adapted from the University of Calgary's teaching award nomination portfolio adjudication process (L. Taylor, personal communication, February 23, 2015), and is explained as follows:

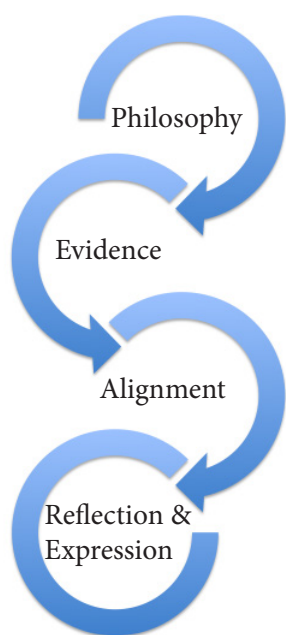
**Philosophy.** First and foremost, the portfolio should be grounded in a philosophy statement that provides a critically reflective overview of your key beliefs and claims about practice (see Chapter 5).

**Evidence.** Selected evidence of these beliefs and claims must be presented and integrated throughout the portfolio. This evidence should be provided from multiple perspectives (e.g., self, peers, instructors, program participants, scholarship) and data sources.

**Alignment.** The portfolio should present and make explicit how this evidence aligns with the key claims presented in the educational development philosophy statement, and where appropriate, how this evidence aligns with key criteria related to summative processes such as hiring, performance management, awards criteria, and tenure and promotion. Strong portfolios will also triangulate and align data related to the key claims across multiple sources of evidence. For example, if one of your claims to practice is a research-informed approach, you might first introduce this in your philosophy statement, citing a relevant piece of scholarly literature (self, scholarship). In the body of the portfolio, you may provide an overview of the scope of your educational development practice by providing summaries and descriptions of an educational development program you have developed using

research-informed approaches (self, scholarship). To highlight the quality and impact of these programs, you may provide an overview of quantitative and qualitative data from relevant program evaluations (instructors, program participants), and present a letter of support from a peer, underscoring your commitment to implementing research-informed approaches in your educational development practice (peers). When alignment is strong, the portfolio will form an integrated whole clearly communicating your philosophy, practice and impact, and how each of these components are related. (Refer to [Chapters 3](#) and [4](#) for additional details related to the key components of an educational developer's portfolio.)

**Reflection and expression.** The forms in which exemplary educational developer portfolios are expressed vary widely. Most importantly, a portfolio should capture the authentic voice of the author. In each case, the person behind the portfolio should shine through. The fabric of the portfolio should be grounded in a strong personal and critically reflective narrative that provides the reader with an understanding of the author's beliefs, unique roles, responsibilities, experiences, expertise and context. This reflective narrative should leave the reader with a clear understanding of why you do what you do as an educational developer, and how you hope to continue to grow and improve as your roles, responsibilities, experiences and expertise progress.



*Figure 7.1.* Framework for the Evaluation of an Educational Developer's Portfolio.

## Example Rubrics and Questions to Guide the Assessment and Review of Educational Developer Portfolios

[Tables 7.1](#) and [7.2](#) present sample rubrics to help guide the assessment of educational developer portfolios. These rubrics build upon the framework presented in [Figure 7.1](#) as well as the discussion about the requirements for portfolios presented in earlier sections of this chapter. As mentioned previously, one of the most important steps you can take to assess your portfolio is to gather feedback from peers. [Table 7.1](#) provides a general framework for formative assessment and review of an educational developer's portfolio (e.g., for self/peer assessment). The items presented in this rubric, as well as the questions presented in [Table 5.2](#) (see [Chapter 5](#)) can be adapted more generally within this context. For example, the questions presented below may provide a starting point for guiding the peer-review process:

- Is the portfolio strongly grounded in an educational development philosophy statement that clearly summarizes the author's core beliefs about educational development, and the key claims he/she makes about his/her practice? Does the philosophy statement provide a strong framework for the presentation and organization of the portfolio?
- Is evidence provided from multiple perspectives (e.g., self, instructors, peers, program participants, scholarship) to substantiate claims made throughout the portfolio? Are the sources of evidence appropriate given the context of the author's educational development roles, responsibilities, experiences, and expertise? (Note: the depth of evidence presented in a new developer portfolio will vary from that from of an experienced educational developer or a director of a teaching and learning centre or institute.) Can strong alignment be seen between the evidence provided and claims made throughout the portfolio?
- Are links to scholarly literature provided throughout the portfolio where appropriate?
- Is the portfolio grounded by a critically reflective narrative that puts the evidence into context, highlights key learning, and describes how the author's educational development approaches have developed and evolved over time? Does the reflective component make connections between the philosophy statement and evidence, and across




sources of evidence? Is the author's voice evident and consistent throughout the portfolio?

- Is the portfolio presented as a clear, succinct, and integrated document? Is the portfolio presented in a way that is appropriate for the intended audience and purpose and given the author's educational development roles, responsibilities, experience and expertise? Is the portfolio organized in a way to direct and guide the reader?
- In general, what are the strengths of this portfolio? What specific changes could be made to improve this portfolio?

Table 7.2 provides an example rubric for assessing educational developer portfolios within the context of a job application process for an entry-level educational development position. The criteria presented in this rubric have been adapted from Dawson et al.'s (2010a) competency model for entry-level educational developers (refer to [Chapter 3](#)). These criteria may also be adapted for more senior-level positions based on the competency models presented in [Chapter 3](#) (see [Figures 3.2 and 3.3](#)). This rubric provides an example framework for assessing portfolio-based job applications that should be adapted within the context of the specific institutional job requirements and hiring processes.

## Conclusion

This chapter provided an overview and framework for guiding both the formative and summative assessment of educational developer portfolios. A variety of authors agree processes for implementing and evaluating educational developer portfolios must reflect the inherent complexity and richness of educational development and post-secondary education (Seldin et al., 2010; Stanley, 2001; Wright & Miller, 2000). It is important to remember that your portfolio will continue to evolve as your educational development roles, responsibilities, and experiences grow. Regardless of your career stage, the portfolio provides an important opportunity to critically reflect upon and provide evidence of the scope, quality and impact of your work. As we continue to share and reflect upon the depth, breadth and richness of our practice through the development, review, and evaluation of educational developer portfolios, we are certain to help create a culture that supports the value and growth of our individual and collective work as an educational development community.



Most importantly, a portfolio should capture the authentic voice of the author.

Table 7.1

*Example Rubric for the Formative Assessment of Educational Developer Portfolios*

Instructions: Rate each item using the scale provided at the end of this table.

| Criteria   | Rating <sup>a</sup> | Comments |
|--|---------------------|----------|
| <p><i>Educational Development Philosophy</i></p> <ul style="list-style-type: none"> <li>Clearly summarizes core beliefs related to educational development and key claims about practice</li> <li>Core beliefs are grounded in scholarship and personal experience</li> <li>Briefly illustrates beliefs with examples of educational development strategies and approaches to demonstrate alignment</li> <li>Provides examples of strategies used to evaluate educational development practices and effectiveness, including impact and influence on educational practice</li> <li>Demonstrates a commitment to continuous improvement and summarizes future goals</li> <li>Provides a framework for the presentation and organization of the portfolio</li> </ul>   |                     |          |
| <p><i>Quality and Alignment of Evidence</i></p> <ul style="list-style-type: none"> <li>Evidence of specific educational development practices and approaches is presented from multiple perspectives (e.g., self, instructors, peers, program participants, scholarship) and data sources</li> <li>Sources of evidence are appropriate given the context of one's roles, responsibilities, and experiences as well as the audience and purpose of the portfolio</li> <li>Evidence presented clearly aligns with the claims made in the educational development philosophy statement</li> <li>Strong alignment is presented across multiple sources of data as it relates to the claims made in one's philosophy (i.e., triangulation of data is evident throughout dossier)</li> </ul>   |                     |          |
| <p><i>Scholarship</i></p> <ul style="list-style-type: none"> <li>Links to scholarly literature are provided throughout the portfolio to ground key claims and approaches to practice</li> <li>Citations are included and sourced clearly and consistently in a bibliography</li> <li>Contributions to the scholarship of educational development and/or teaching and learning are included</li> <li>Critical Reflection</li> <li>Critical reflection is integrated throughout the portfolio</li> <li>Evaluates how evidence of educational development approaches relate to one's core beliefs and philosophy</li> <li>Includes integrated summaries related to the scope, impact and quality of educational development approaches to put evidence into context and highlight key learnings</li> <li>Evaluates how educational development approaches have evolved over time based on personal contexts and experiences</li> <li>Presents future implications related to one's continued professional growth and development</li> </ul> |                     |          |
| <p><i>Personal Expression and Context</i></p> <ul style="list-style-type: none"> <li>Author's voice is evident, consistent and authentic throughout the portfolio</li> <li>Narrative summaries are provided to provide personal context related to the evidence included in the portfolio</li> <li>Philosophy, strategies, and evidence are grounded in one's experience and personal context</li> </ul>   |                     |          |
| <p><i>Design and Organization</i></p> <ul style="list-style-type: none"> <li>Presented as a clear, succinct, and integrated document</li> <li>Professionally presented in a way that is appropriate for the intended audience and purpose</li> <li>Logical and consistent structure is provided, including a table of contents and/or other prompts to provide navigation and direct the reader</li> <li>Assembly and presentation of portfolio is appropriate to mode of sharing (i.e., print, digital, e-portfolio)</li> </ul>   |                     |          |

a Rating Scale:

3 = all components included, exceeds expectations

2 = most components included, some revisions required

1 = many components missing, major revisions required

Note. This rubric builds upon elements of the structure and content presented in: Britnell, J. (n.d.). *Teaching dossier rubric for evaluation*. Toronto: Ryerson University. Retrieved from [http://www.ryerson.ca/lt/programs/workshops/dossier\\_rubric\\_final.pdf](http://www.ryerson.ca/lt/programs/workshops/dossier_rubric_final.pdf) and Indiana University. (2007). *Rubric for evaluating teaching portfolios for M620 SoTL study*. Bloomington, IN: Indiana University.

Table 7.2

*Example Rubric for Evaluating Job Applications for an Entry-level Educational Development Position*Instructions: Rate each item using the scale provided at the end of this table.<sup>a</sup>

| Criteria <sup>b</sup>   | Rating | Comments |
|---|--------|----------|
| <i>Skills and Abilities</i> <ul style="list-style-type: none"> <li>• Uses research-informed educational development practices</li> <li>• Delivers and evaluates a wide-range of offerings such as teaching-related workshops, seminars or courses</li> <li>• Implements effective strategies to support program planning</li> <li>• Seeks feedback and engages in reflective practice to improve their work</li> <li>• Actively engages in the scholarship of teaching and learning and/or educational development</li> </ul> |        |          |
| <i>Competencies</i> <ul style="list-style-type: none"> <li>• Communicates effectively, in written and verbal forms, to best meet the needs of the target audience</li> <li>• Plans and manages projects effectively</li> <li>• Consults effectively with instructors and groups to identify their specific needs</li> <li>• Selects appropriate educational development strategies to best meet the needs of the individuals and groups</li> </ul>  |        |          |
| <i>Characteristics</i> <ul style="list-style-type: none"> <li>• Contributes productively to collaborative processes and team-building</li> <li>• Demonstrates passion for the fields of educational development and post-secondary education</li> <li>• Demonstrates self-awareness and a commitment to ongoing professional development</li> <li>• Employs novel solutions in their work</li> </ul>  |        |          |
| <i>Knowledge</i> <ul style="list-style-type: none"> <li>• Demonstrates understanding of major theories on teaching and learning (e.g. outcomes-based learning, curriculum theories, learning theories)</li> <li>• Demonstrates understanding of how institutional cultures and disciplinary differences apply to their educational development work</li> </ul>  |        |          |
| <i>Other Institution-Specific Job Requirements</i> <ul style="list-style-type: none"> <li>• Note: insert additional knowledge, skills, characteristics and competencies in accordance with job requirements and institutional hiring processes</li> </ul>   |        |          |

a. Rating Scale adapted from “University of Calgary Teaching Awards Program Adjudication Rubrics,” University of Calgary (n.d.), Calgary, Alberta: University of Calgary. Retrieved from <http://ucalgary.ca/taylorinstitute/edu/node/284>

- 1- Does not meet expectations outlined in the job posting. Little or no evidence provided in the portfolio related to this criterion.
- 2- Meets some expectations outlined in job posting. Some evidence provided in the portfolio to support this criterion, but some gaps clearly evident. Alignment between multiple sources of evidence (e.g. from applicant, peers and/or learners) is unclear for this criterion.
- 3- Meets expectation of job posting. Clear evidence provided from at least one source in the portfolio to support this criterion, with very few gaps evident. Alignment between multiple sources of evidence (e.g., from applicant, peers and/or learners) somewhat clear for this criterion.
- 4- Exceeds expectation of job posting. Outstanding evidence provided from multiple sources of evidence in the portfolio to support this criterion. Alignment between multiple sources of evidence (e.g., peers, learners and applicant) very clear for this criterion.

b. Criteria provided as a guide and have been adapted from Dawson et al.’s (2010a) competency model for entry-level educational developers (refer to [Chapter 3](#)). Criteria to be adapted based on specific institutional job requirements and hiring processes.

# Chapter 8

## The Portfolio Journey

“Learning without reflecting is labour lost;  
thought without learning is perilous.”

-- Confucius, n.d.

In bringing this guide to a close, we have provided some suggestions on how its various parts can be used to bring reflections and evidence for your work together in an educational developer's portfolio.

### Pathways to a Portfolio

An educational development philosophy is a **logical** starting point of the portfolio journey and involves examining your beliefs about educational development as suggested in [Chapter 5](#). What are your beliefs? Why are they important to you? How do you translate them into your daily practices? Once you set the stage and tone for your portfolio, you may share your stories along your career path. Who are your mentors? What guides your practices?

**Keeping records** of your work, including workshops you facilitated, groups you led, curriculum plans you helped design, institutional initiatives you collaborated on or led, and any other activities you have engaged in as an educational developer throughout your career is helpful. More importantly, the portfolio allows you to critically **evaluate your actions** using questions such as those

outlined in [Chapter 2](#). Be sure to support statements about your actions with your educational development beliefs. Why and what evidence supports the work you did? What impact have you created? Thinking through these questions and aligning your actions, beliefs, and impacts are important as you continue to build your portfolio. Refer to [Chapter 4](#) for tools and resources to assist you in this endeavour. A long list of works may be impressive at the first glance, but it needs to be supplemented with reflections and narratives.

Consider **what are your proudest accomplishments?**

Are these accomplishments the ones you want to showcase? To whom are you showcasing? [Chapter 4](#) helps you select the right artifacts to showcase for the right purpose and audience. In that chapter you will also find examples of how to align actions, beliefs, and impact as well as different types of narratives.

If you started your portfolio years ago and are ready to **make revisions**, the inventories referenced in [Chapter 3](#) (see [Appendices A, B, and C](#)) can be tremendously useful. Available in the appendices of this guide, the inventories offer an opportunity to assess your progression as an educational developer, and help identify growth opportunities. Completing the inventories may further help you identify what to showcase in your portfolio. For example, what skills might be important to profile yourself as a mid-career educational developer versus an entry-level educational developer? Furthermore, the inventories can help identify gaps in your competencies as an educational developer for future development. Are you ready to apply for and move to the next level of your career (e.g., associate director)? Try the inventory for directors. In short, the inventories do not just help you prepare your portfolio, they help you to plan your own professional development pathway.

**Are you ready to go live?** Use the “Materials to Include in Your Educational Developer’s Portfolio” referenced in [Chapter 6](#) (see [Appendix D](#)) to help you decide if you should choose a paper versus an electronic delivery format for your educational developer’s portfolio, as the two serve very different purposes. Should you decide to go live with your portfolio, look for online examples of

content and presentation ideas (select examples can be found in [Chapter 6](#)), and meet with learning technologist colleagues from your institution or company to identify a platform to host your portfolio. As noted in [Chapter 6](#), online readers often skim or even skip through passages longer than two pages. Moving your portfolio online from a paper-based format requires a lot of editing, reorganizing, and reformatting to fit the needs of online audiences.

Once your portfolio is assembled, **assess your portfolio** based on its practicality, relevance, acceptability, and scholarship. Use the guiding questions in [Chapter 7](#) to refine your portfolio. Better yet, form a small support group with a couple of colleagues and share feedback with each other on a regular basis. You may want to dedicate a couple hours every month to update and polish your portfolio.

As we all embark on this journey of creating, developing, and assessing our educational developer portfolios, we ask that you share the experience of your journeys with fellow educational developers at conferences and in journals. With your contributions, we will be able to demonstrate our value to colleagues in higher education and the general public, and advance our profession as a whole.

“My educational developer’s portfolio is my playground: a place to play with technology; a place to take a break from my everyday educational development activities; and a place to ponder. The educational developer’s portfolio serves as a needed, tranquil space where I can reflect on what I do, and learn why and how I can continue to enrich the education journeys of many others.”

- Judy Chan, Educational Developer, University of British Columbia

# Appendix A

## Inventory 3.1: Assessing Your Development Entry Level Educational Developer

| Skills, knowledge, and attributes identified as important for developers |   | Items | Self-rating (1-5)   |   |   |   |    |  |
|--|---|-------|---|---|---|---|----|--|
|  |   |       | 1 – Not true of me<br>2 – Slightly true of me<br>3 – Moderately true of me<br>4 – Quite true of me<br>5 - Very true of me<br>n/a – Not applicable |   |   |   |    |  |
| Foundational Characteristics   |   |       |   |   |   |   |    |  |
| Team Player  | I am a good team player.  | 1     | 2   | 3 | 4 | 5 | NA |  |
|  | I contribute towards teams achieving common goals.  | 1     | 2   | 3 | 4 | 5 | NA |  |
| Passion and commitment to professional development                       | I am aware of areas in which I would benefit from professional development.                 | 1     | 2   | 3 | 4 | 5 | NA |  |
|  | I have a learning plan to address my own professional development needs.                    | 1     | 2   | 3 | 4 | 5 | NA |  |
| Self-awareness   | I am able to distinguish my own motivations from those with whom I am working.              | 1     | 2   | 3 | 4 | 5 | NA |  |
| Collaboration  | I promote collaboration within my work environment.   | 1     | 2   | 3 | 4 | 5 | NA |  |
|  | I model ethical behaviours in my work.  | 1     | 2   | 3 | 4 | 5 | NA |  |
| Openness to new experiences  | I thrive in new ideas and approaches.   | 1     | 2   | 3 | 4 | 5 | NA |  |
| Creativity   | I employ novel solutions in my workplace.   | 1     | 2   | 3 | 4 | 5 | NA |  |
| Patience   | I am patient with individuals and groups.   | 1     | 2   | 3 | 4 | 5 | NA |  |
| Persistence  | I persevere in helping clients meet their developmental goals                               | 1     | 2   | 3 | 4 | 5 | NA |  |
| Institutional fit  | I work effectively within my current organizational culture.                                | 1     | 2   | 3 | 4 | 5 | NA |  |
| Skills and Abilities Developed in the Learning Process                   |   |       |   |   |   |   |    |  |
| Reflective practice  | I routinely think about how I could improve my work.  | 1     | 2   | 3 | 4 | 5 | NA |  |
|  | I solicit feedback on my educational development practice.                                  | 1     | 2   | 3 | 4 | 5 | NA |  |
| Learning skills  | I apply knowledge of student learning to my educational development activities.             | 1     | 2   | 3 | 4 | 5 | NA |  |
| Teaching skills  | I have the skills to enhance workshop/course participants’ learning and developmental needs | 1     | 2   | 3 | 4 | 5 | NA |  |
|  | I regularly update my knowledge about teaching skills and trends                            | 1     | 2   | 3 | 4 | 5 | NA |  |

(Continued)



| Skills and Abilities Developed in the Learning Process          |  |   |   |   |   |   | continued |
|---|--|---|---|---|---|---|-----------|
| Outreach and Marketing Administration                           | I take an evidence-based approach to my teaching.  | 1 | 2 | 3 | 4 | 5 | NA        |
|   | I know how to market my programs/services to diverse groups.   | 1 | 2 | 3 | 4 | 5 | NA        |
|   | I am skilled at planning programming.  | 1 | 2 | 3 | 4 | 5 | NA        |
|   | I am skilled at delivering a wide range of offerings such as teaching-related workshops, seminars, or courses.                               | 1 | 2 | 3 | 4 | 5 | NA        |
|   | To support programming, I am able to organize a variety of complex resources (e.g., schedules, venues, formats, people, and communications). | 1 | 2 | 3 | 4 | 5 | NA        |
| Research  | I conduct productive meetings.   | 1 | 2 | 3 | 4 | 5 | NA        |
|   | I stay current on research on teaching and learning.   | 1 | 2 | 3 | 4 | 5 | NA        |
|   | I stay current on research on educational development.   | 1 | 2 | 3 | 4 | 5 | NA        |
|   | I conduct research on teaching and learning.   | 1 | 2 | 3 | 4 | 5 | NA        |
|   | I conduct research on educational development.   | 1 | 2 | 3 | 4 | 5 | NA        |
| Effective listening   | I listen actively to identify the needs of others.   | 1 | 2 | 3 | 4 | 5 | NA        |
|   | I am able to put people at ease when discussing teaching and learning issues.  | 1 | 2 | 3 | 4 | 5 | NA        |
| <b>Knowledge</b>  |  |   |   |   |   |   |           |
| Curriculum development theory                                   | I can describe several curriculum theories.  | 1 | 2 | 3 | 4 | 5 | NA        |
|   | I apply curriculum development theory to my work.  | 1 | 2 | 3 | 4 | 5 | NA        |
| Teaching and learning theory                                    | I can describe the major theories on teaching and learning.  | 1 | 2 | 3 | 4 | 5 | NA        |
| Adult learning theory   | I can describe aspects of learning unique to adults.   | 1 | 2 | 3 | 4 | 5 | NA        |
| Group dynamics  | I can describe the theories on group dynamics.   | 1 | 2 | 3 | 4 | 5 | NA        |
| Outcome-based learning  | I can explain how outcome-based learning theories apply to curriculum development.   | 1 | 2 | 3 | 4 | 5 | NA        |
| Philosophies of education                                       | I can assist people in developing their own philosophy of teaching and learning.   | 1 | 2 | 3 | 4 | 5 | NA        |
| Understanding organizational cultures using multiple frameworks | My understanding of my institution’s culture informs my work.  | 1 | 2 | 3 | 4 | 5 | NA        |
|   | I apply my knowledge of disciplinary differences effectively in my work.   | 1 | 2 | 3 | 4 | 5 | NA        |
| Communicate effectively   | I am effective when speaking with individuals and groups.  | 1 | 2 | 3 | 4 | 5 | NA        |
|   | I am able to write effectively to specific target audiences.   | 1 | 2 | 3 | 4 | 5 | NA        |
| Planning and implementation                                     | I can plan, prepare, and deliver educational development programming.  | 1 | 2 | 3 | 4 | 5 | NA        |
|   | I can evaluate educational development programming.  | 1 | 2 | 3 | 4 | 5 | NA        |
| Facilitating change and development                             | I can apply principles and practices of change development at my institution.  | 1 | 2 | 3 | 4 | 5 | NA        |
|   | I am able to support change in individuals.  | 1 | 2 | 3 | 4 | 5 | NA        |

(Continued)

| Knowledge  |   | continued |   |   |   |   |    |
|--|---|-----------|---|---|---|---|----|
| Project management   | I can plan projects.  | 1         | 2 | 3 | 4 | 5 | NA |
|  | I can manage projects effectively.  | 1         | 2 | 3 | 4 | 5 | NA |
|  | I can assess the outcomes of a project.   | 1         | 2 | 3 | 4 | 5 | NA |
| Team building  | I can facilitate activities to develop a sense of common purpose among group members. | 1         | 2 | 3 | 4 | 5 | NA |
| Effective consulting                                       | I can communicate with stakeholders to identify their needs.                          | 1         | 2 | 3 | 4 | 5 | NA |
|  | I can communicate with stakeholders to identify common goals.                         | 1         | 2 | 3 | 4 | 5 | NA |
|  | I can work effectively with faculty to address their teaching issues.                 | 1         | 2 | 3 | 4 | 5 | NA |
| Ability to select appropriate teaching/learning strategies | I can conduct a needs assessment  | 1         | 2 | 3 | 4 | 5 | NA |
|  |   | 1         | 2 | 3 | 4 | 5 | NA |
|  |   | 1         | 2 | 3 | 4 | 5 | NA |
| _____  | _____   | 1         | 2 | 3 | 4 | 5 | NA |
| _____  | _____   | 1         | 2 | 3 | 4 | 5 | NA |

*Note:* Empty rows are provided at the end of the table so that individuals may add up to two items to reflect role-specific needs.

Adapted from “Developing competency models of faculty developers: Using world café to foster dialogue” by D. Dawson, J. Britnell, and A. Hitchcock, 2010, *To Improve the Academy*, 28, p.16. Copyright 2010 by John Wiley & Sons, Inc. Adapted with permission.

# Appendix B

## Inventory 3.2: Assessing Your Development Senior Level Educational Developer

| Skills, knowledge, and attributes identified as important for developers |  | Items | Self-rating (1-5) |   |   |   |    |                      |
|--|--|-------|-------------------|---|---|---|----|----------------------|
|  |  |       | 1                 | 2 | 3 | 4 | 5  | n/a – Not applicable |
| Foundational Characteristics   |  |       |                   |   |   |   |    |                      |
| Passion for education development  | I am committed to my work as an educational developer.   | 1     | 2                 | 3 | 4 | 5 | NA |                      |
|  | I am enthusiastic about my work.   | 1     | 2                 | 3 | 4 | 5 | NA |                      |
| Initiative   | I take the initiative to introduce new ideas into my work.                                     | 1     | 2                 | 3 | 4 | 5 | NA |                      |
|  | I have a learning plan to address my own professional development needs.                       | 1     | 2                 | 3 | 4 | 5 | NA |                      |
| Lifelong learner   | I stay current on emerging trends and theories within the educational development field.       | 1     | 2                 | 3 | 4 | 5 | NA |                      |
|  | I stay current on the scholarly literature related to teaching and learning.                   | 1     | 2                 | 3 | 4 | 5 | NA |                      |
| Open to feedback   | I actively seek out feedback from others.  | 1     | 2                 | 3 | 4 | 5 | NA |                      |
|  | I am able to reflect on successes in my work.  | 1     | 2                 | 3 | 4 | 5 | NA |                      |
| Persistence  | I recognize areas where I need to improve in my work.  | 1     | 2                 | 3 | 4 | 5 | NA |                      |
|  | I persevere in the face of difficulties.   | 1     | 2                 | 3 | 4 | 5 | NA |                      |
| Creativity   | I have innovative ways of thinking about programs or activities.                               | 1     | 2                 | 3 | 4 | 5 | NA |                      |
| Adaptability   | I am able to adapt when confronted with new priorities.  | 1     | 2                 | 3 | 4 | 5 | NA |                      |
| Skills and Abilities Developed in the Learning Process                   |  |       |                   |   |   |   |    |                      |
| Interpersonal skills: Conflict resolution, diplomacy, trust, listening   | I am able to resolve conflicts effectively.  | 1     | 2                 | 3 | 4 | 5 | NA |                      |
|  | I actively build rapport with colleagues.  | 1     | 2                 | 3 | 4 | 5 | NA |                      |
| Interpersonal skills: Negotiation and mediation                          | I am able to understand competing interests.   | 1     | 2                 | 3 | 4 | 5 | NA |                      |
|  | I can facilitate the resolution of problems people are having.                                 | 1     | 2                 | 3 | 4 | 5 | NA |                      |
| Interpersonal skills: Empathy  | I know how to behave in different disciplinary groups.   | 1     | 2                 | 3 | 4 | 5 | NA |                      |
|  | I listen actively to different points of view.   | 1     | 2                 | 3 | 4 | 5 | NA |                      |
| Educational leadership   | I can respond appropriately to diverse points of view.   | 1     | 2                 | 3 | 4 | 5 | NA |                      |
|  | I provide leadership on campus to committees or other groups related to teaching and learning. | 1     | 2                 | 3 | 4 | 5 | NA |                      |
|  | I am an effective team leader.   | 1     | 2                 | 3 | 4 | 5 | NA |                      |

(Continued)

| Skills and Abilities Developed in the Learning Process                       |   |   |   |   |   |   | continued |
|--|---|---|---|---|---|---|-----------|
|  | I inspire others to contribute positively to enhancing teaching and learning at my institution.   | 1 | 2 | 3 | 4 | 5 | NA        |
| Self-reflection  | After completing courses, projects, and tasks, I reflect on my work and consider areas for improvement.   | 1 | 2 | 3 | 4 | 5 | NA        |
| Peer mentoring/coaching  | I work collegially with others to facilitate their development as teachers and/or educational developers.   | 1 | 2 | 3 | 4 | 5 | NA        |
| Role modeling  | I model facilitation skills in my work with others.   | 1 | 2 | 3 | 4 | 5 | NA        |
|  | I model effective teaching and learning practices.  | 1 | 2 | 3 | 4 | 5 | NA        |
| Consultation   | I model collaborative group processes in my interactions with colleagues.   | 1 | 2 | 3 | 4 | 5 | NA        |
|  | I work with individuals and groups on issues related to teaching and learning.  | 1 | 2 | 3 | 4 | 5 | NA        |
| Knowledge  |   |   |   |   |   |   |           |
| Formal credential in field of pedagogy (Masters or Doctoral level preferred) | I possess or am pursuing Master or Doctoral level qualifications related to the field of educational development.   | 1 | 2 | 3 | 4 | 5 | NA        |
| Credentials in the field of ED   | I have additional educational developer credentials such as Instructional Skills Workshop (ISW), Facilitator Development Workshop (FDW), Certified Training and Development Professional (CTDP) or SEDA fellowship. | 1 | 2 | 3 | 4 | 5 | NA        |
| Organizational behaviour: Knowledge  | I am knowledgeable about theories and methods of organizational behaviour.  | 1 | 2 | 3 | 4 | 5 | NA        |
| Organizational behaviour: Application  | I have the ability to apply organizational behaviour theories in my workplace.  | 1 | 2 | 3 | 4 | 5 | NA        |
| Competencies   |   |   |   |   |   |   |           |
| Educator: Adult learning   | I am able to apply my knowledge of adult learning to my work.   | 1 | 2 | 3 | 4 | 5 | NA        |
| Curriculum development skills: Course design                                 | I have the ability to assist others with effective course and curriculum development.   | 1 | 2 | 3 | 4 | 5 | NA        |
| Curriculum development skills: Assessment and evaluation                     | I apply varied assessment strategies in my curriculum work.   | 1 | 2 | 3 | 4 | 5 | NA        |
| Curriculum development skills: Instructions strategies                       | I am capable of helping others evaluate the appropriateness of a variety of instructional strategies.   | 1 | 2 | 3 | 4 | 5 | NA        |
| _____  | _____   | 1 | 2 | 3 | 4 | 5 | NA        |
| _____  | _____   | 1 | 2 | 3 | 4 | 5 | NA        |

*Note.* Empty rows are provided at the end of the table so that individuals may add up to two items to reflect role specific needs. Adapted from “Developing competency models of faculty developers: Using world café to foster dialogue” by D. Dawson, J. Britnell, and A. Hitchcock, 2010, *To Improve the Academy*, 28, p.17. Copyright 2010 by John Wiley & Sons, Inc. Adapted with permission.

# Appendix C

## Inventory 3.3: Assessing Your Development Director Level Educational Developer

| Skills, knowledge, and attributes identified as important for developers |   | Self-rating (1-5)<br>1 – Not true of me<br>2 – Slightly true of me<br>3 – Moderately true of me<br>4 – Quite true of me<br>5 - Very true of me<br>n/a – Not applicable |   |   |   |   |    |
|--|---|--|---|---|---|---|----|
| Foundational Characteristics   |   |  |   |   |   |   |    |
| Inspiring  | I inspire others to excel in their roles.   | 1  | 2 | 3 | 4 | 5 | NA |
| Constantly learning  | I have a strong commitment to lifelong learning including self-directed study and research.   | 1  | 2 | 3 | 4 | 5 | NA |
| Skills and Abilities   |   |  |   |   |   |   |    |
| Ability to balance multiple roles (leader, scholar, manager)             | I am able to balance the roles of leader, scholar, educational developer, and manager.  | 1  | 2 | 3 | 4 | 5 | NA |
| Time management  | I excel at ensuring tasks and projects are delivered on time.   | 1  | 2 | 3 | 4 | 5 | NA |
| Strategic planning/prioritizing  | I am able to prioritize and align planning initiatives.   | 1  | 2 | 3 | 4 | 5 | NA |
| Project management   | I guide projects from their conception through to completion.   | 1  | 2 | 3 | 4 | 5 | NA |
| Assessment   | I am able to evaluate the impact and quality of programs to prioritize future program directions.   | 1  | 2 | 3 | 4 | 5 | NA |
| Delegation   | I am able to appropriately assign tasks to others.  | 1  | 2 | 3 | 4 | 5 | NA |
|  | I assign work to others to enhance their professional development.  | 1  | 2 | 3 | 4 | 5 | NA |
| Financial / budget management  | I have the ability to develop and manage budgets.   | 1  | 2 | 3 | 4 | 5 | NA |
|  | I can advocate for the funding of teaching and learning initiatives.  | 1  | 2 | 3 | 4 | 5 | NA |
|  | I am inventive in finding funding for teaching and learning initiatives.  | 1  | 2 | 3 | 4 | 5 | NA |
| Knowledge  |   |  |   |   |   |   |    |
| Higher education theory  | I apply knowledge of higher educational theories in my work.  | 1  | 2 | 3 | 4 | 5 | NA |
|  | I contribute to the advancement of higher education.  | 1  | 2 | 3 | 4 | 5 | NA |
| Professional development   | I keep current through participation in professional development activities such as conferences.  | 1  | 2 | 3 | 4 | 5 | NA |
|  | I contribute to the professional development of others.   | 1  | 2 | 3 | 4 | 5 | NA |
|  | I engage in research on educational development.  | 1  | 2 | 3 | 4 | 5 | NA |
|  | I actively participate in professional bodies such as the Educational Developers Caucus.  | 1  | 2 | 3 | 4 | 5 | NA |
| Human resources  | I have an understanding of institutional policies and processes around human resources including good hiring practices (e.g., job descriptions, training, mentoring). | 1  | 2 | 3 | 4 | 5 | NA |



| <b>Knowledge</b>                              |  | <b>continued</b> |   |   |   |   |    |
|---|--|------------------|---|---|---|---|----|
| Theoretical knowledge                         | I am knowledgeable about theories related to teaching and learning in higher education.              | 1                | 2 | 3 | 4 | 5 | NA |
|   | I know about leadership and change management theories.  | 1                | 2 | 3 | 4 | 5 | NA |
| <b>Competencies</b>                           |  |                  |   |   |   |   |    |
| Facilitator                                   | I have the skills required to facilitate diverse groups effectively.                                 | 1                | 2 | 3 | 4 | 5 | NA |
| Change advocacy                               | I understand different models of change management.  | 1                | 2 | 3 | 4 | 5 | NA |
|   | I can advocate for change effectively.   | 1                | 2 | 3 | 4 | 5 | NA |
| Change management agent                       | I am able to influence change at the institutional level.  | 1                | 2 | 3 | 4 | 5 | NA |
|   | I am able to implement change at my centre.  | 1                | 2 | 3 | 4 | 5 | NA |
| Relationship management                       | I foster the development of strong relationships between colleagues across all institutional levels. | 1                | 2 | 3 | 4 | 5 | NA |
|   | I cultivate relationships with colleagues at multiple institutions and organizations.                | 1                | 2 | 3 | 4 | 5 | NA |
| Teaching                                      | I model effective teaching practices in my workshops and/or presentations.                           | 1                | 2 | 3 | 4 | 5 | NA |
| Policy development                            | I contribute to the development of policies related to teaching and learning.                        | 1                | 2 | 3 | 4 | 5 | NA |
| Community building                            | I develop community within my institution.   | 1                | 2 | 3 | 4 | 5 | NA |
| Communities of practice                       | I work to champion communities of practice at my institution.  | 1                | 2 | 3 | 4 | 5 | NA |
| Mentor: Internal                              | I mentor colleagues within my centre.  | 1                | 2 | 3 | 4 | 5 | NA |
| Mentor: External                              | I mentor colleagues throughout my institution.   | 1                | 2 | 3 | 4 | 5 | NA |
|   | I mentor colleagues in the broader higher education community.                                       | 1                | 2 | 3 | 4 | 5 | NA |
| Scholarship of teaching and learning research | I perform research on teaching.  | 1                | 2 | 3 | 4 | 5 | NA |
|   | I advocate for faculty engaged in research on teaching and learning at my institution.               | 1                | 2 | 3 | 4 | 5 | NA |
| _____   | _____  | 1                | 2 | 3 | 4 | 5 | NA |
| _____   | _____  | 1                | 2 | 3 | 4 | 5 | NA |

*Note.* Empty rows are provided at the end of the table so that individuals may add up to two items to reflect role specific needs.

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# Appendix D

## *Materials to Include in Your Educational Developer's Portfolio*

**Instructions.** Look over items in the list below to identify materials you might collect, or descriptions of work you might wish to write for your portfolio. The list is lengthy and is meant to prompt your memory for knowledge, skills, and experiences you bring to the role of educational development.

|  |  | Collect | Write |
|--|--|---------|-------|
| <b>1. General</b>  |  |         |       |
|  | introductory information                 |         |       |
|  | institution                              |         |       |
| <b>2. Educational development philosophy</b>                 |  |         |       |
|  | reflective statement                     |         |       |
| <b>3. Educational development roles and responsibilities</b> |  |         |       |
|  | TA development                           |         |       |
|  | new faculty development                  |         |       |
|  | teaching chairs                          |         |       |
|  | teaching professors                      |         |       |
|  | adjunct, sessional, contract professors  |         |       |
| <b>4. Services</b>   |  |         |       |
|  | consultations                            |         |       |
|  | facilitation                             |         |       |
|  | advising                                 |         |       |
|  | classroom observations                   |         |       |
|  | teaching (see teaching experience below) |         |       |
| <b>5. Initiatives</b>  |  |         |       |
|  | led by you                               |         |       |
|  | team member, role & contributions        |         |       |
| <b>6. Policies and other projects</b>                        |  |         |       |
|  | led by you                               |         |       |
|  | team member contribution                 |         |       |

|  |  | Collect | Write |
|--|--|---------|-------|
| <b>7. Events</b>   |  |         |       |
|  | annual events  |         |       |
|  | programs   |         |       |
|  | lecture series   |         |       |
|  | workshop series  |         |       |
|  | communities of practice                                |         |       |
|  | brown-bag luncheons                                    |         |       |
|  | retreats   |         |       |
|  | institutes   |         |       |
|  | specialized training                                   |         |       |
|  | other events:  |         |       |
| <b>8. Planning</b>   |  |         |       |
|  | coordination   |         |       |
|  | administration   |         |       |
|  | organizing   |         |       |
|  | strategic plans  |         |       |
|  | agendas for retreats                                   |         |       |
|  | agendas for workshops                                  |         |       |
| <b>9. Educational development approaches, methods, and materials</b> |  |         |       |
|  | educational development approaches & related materials |         |       |
|  | workshop plans   |         |       |
|  | policy documents                                       |         |       |
|  | resource guides  |         |       |
|  | proposals  |         |       |
|  | peer observation reports                               |         |       |

(Continued)

|            |  | Collect | Write |
|------------|--|---------|-------|
| <b>10.</b> | <b>Educational Development innovations and leadership</b>                            |         |       |
|            | your Educational Development innovations   |         |       |
|            | leadership at the individual, institutional, or sector-level                         |         |       |
|            | narrative about innovations  |         |       |
|            | reflections, evaluations of innovations  |         |       |
|            | planned next steps   |         |       |
| <b>11.</b> | <b>Curriculum development work</b>   |         |       |
|            | new programs   |         |       |
|            | program revision   |         |       |
|            | program analysis   |         |       |
|            | mapping  |         |       |
|            | processes you have created or facilitated  |         |       |
|            | tools/software you have developed  |         |       |
|            | e-learning initiatives   |         |       |
|            | online materials   |         |       |
| <b>12.</b> | <b>Networking / collaboration</b>  |         |       |
|            | departments with whom you have collaborated  |         |       |
|            | joint projects with other services on campus   |         |       |
|            | joint initiatives with other academic institutions or higher education organizations |         |       |
| <b>13.</b> | <b>Contributions to the field</b>  |         |       |
|            | member of action group(s) or subcommittees   |         |       |
|            | board member, role & title   |         |       |
|            | mentor to other educational developers   |         |       |
|            | materials prepared   |         |       |
|            | manuals and guides   |         |       |
|            | books  |         |       |
|            | conference volunteer   |         |       |

|            |   | Collect | Write |
|------------|---|---------|-------|
| <b>14.</b> | <b>Scholarship of</b>   |         |       |
|            | educational development   |         |       |
|            | curriculum practice   |         |       |
|            | teaching and learning   |         |       |
|            | scholarly inquiry   |         |       |
|            | leadership  |         |       |
| <b>15.</b> | <b>Knowledge dissemination</b>  |         |       |
|            | conference presentations  |         |       |
|            | peer-reviewed publications  |         |       |
|            | reports   |         |       |
|            | discussion papers   |         |       |
|            | reports   |         |       |
|            | discussion papers   |         |       |
|            | other forms   |         |       |
| <b>16.</b> | <b>Presentations</b>  |         |       |
|            | invited talk  |         |       |
|            | invited workshop  |         |       |
|            | invited panel member  |         |       |
|            | round table   |         |       |
|            | poster  |         |       |
|            | list of peer-reviewed conference presentation   |         |       |
|            | peer-reviewed poster presentations, events, other   |         |       |
| <b>17.</b> | <b>Writing and publications</b>   |         |       |
|            | list of educational development publications  |         |       |
|            | research project involvement  |         |       |
|            | successful grant proposals  |         |       |
|            | reviewer for journals, conferences, grants, award applications  |         |       |
|            | other writing   |         |       |
|            | policy document contribution  |         |       |
|            | resource guides   |         |       |
|            | internal newsletters and communications related to educational development activities and initiatives |         |       |

(Continued)

|            |  | Collect | Write |
|------------|--|---------|-------|
|            | blog post reflections  |         |       |
|            | blog posts that highlight scope, quality, and impact of practice                         |         |       |
| <b>18.</b> | <b>Other forms of scholarly knowledge mobilization</b>                                   |         |       |
|            | service on committees  |         |       |
|            | conferences at own institution   |         |       |
|            | conferences outside own institution  |         |       |
|            | grants you have contributed to writing and securing                                      |         |       |
|            | service on committees  |         |       |
|            | conferences organized  |         |       |
|            | mentorship to other educational developers   |         |       |
| <b>19.</b> | <b>Professional development activities</b>   |         |       |
|            | descriptions of growth and evolution as an educational developer (past, present, future) |         |       |
|            | conference and workshops attended  |         |       |
|            | how learning is being applied  |         |       |
|            | other measures you have taken to enhance practice  |         |       |
|            | short-term and long-term educational development goals                                   |         |       |
|            | annual review of own goals and performance with plans for the future                     |         |       |
| <b>20.</b> | <b>Teaching Experience</b>   |         |       |
|            | list of courses taught or teaching   |         |       |
|            | teaching experience and how it has shaped your practice                                  |         |       |
|            | link to digital teaching portfolio   |         |       |
|            | credit courses   |         |       |
|            | non-credit courses   |         |       |
|            | modes of delivery  |         |       |
|            | guest lectures, workshops, seminars  |         |       |

|            |   | Collect | Write |
|------------|---|---------|-------|
| <b>21.</b> | <b>Evidence of effectiveness and impact</b>   |         |       |
|            | measures of impact resulting in change at the individual, institutional, and/or sector level              |         |       |
|            | formative and summative feedback and evaluations related to the effectiveness and impact of your practice |         |       |
| <b>22.</b> | <b>Feedback on programs and courses</b>   |         |       |
|            | program review/assessment   |         |       |
|            | course feedback   |         |       |
|            | course evaluation   |         |       |
|            | midcourse evaluations   |         |       |
|            | peer feedback   |         |       |
|            | comments from employers or industry   |         |       |
|            | list of honours, awards, or nominations   |         |       |
| <b>23.</b> | <b>Data summaries</b>   |         |       |
|            | quantitative and/or qualitative data related to effectiveness and impact                                  |         |       |
|            | workshop evaluations  |         |       |
|            | long-term impact studies  |         |       |
|            | case studies  |         |       |
| <b>24.</b> | <b>Appendices</b>   |         |       |
|            | evidence to support above claims  |         |       |
| <b>25.</b> | <b>Other</b>  |         |       |
|            |   |         |       |
|            |   |         |       |
|            |   |         |       |

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