

Developments in Business Simulation & Experiential Learning, Volume 27, 2000
KNOWING THYSELF: A PORTFOLIO APPROACH TO LEARNER SELF-ASSESSMENT

Nick Maddox, Stetson University
Monique Forte, Stetson University
Robert Boozer, Stetson University

ABSTRACT

Self-assessment instruments, exercises, activities, and worksheets are frequently used in management education and experiential learning to help learners increase their general and specific self-knowledge and awareness. Experiential educators assert that self-knowledge derived from self-assessment activities and debriefings allows learners to make better career decisions while understanding their strengths and weaknesses as potential employees and managers. In this paper, we will describe the portfolio approach to learner self-assessment that has been used in a number of different management courses. Further, we will describe some of the standard and innovative self-assessment methods that can be included in a portfolio approach to promote learner self-awareness.

INTRODUCTION

Self-assessment materials are sometimes used in a more or less haphazard fashion. Perhaps an experiential educator simply uses what assessment tools are available in the text that he/she utilizes. Other times, educators may tend to use tools with which they have familiarity or which have proven successful in the past. Such approaches may inhibit learners' ability to evolve an integrated perspective of who they are, what they believe, and what they aspire to achieve.

When self-assessments are done without linkage to one another learners may not benefit as much as when that linkage is part of a more holistic approach to learner self-assessment. We believe that the use of a portfolio approach increases the likelihood that students will contemplate and make sense of the self-assessments they are asked

to complete. The portfolio approach allows for contemplation and integration to occur because students are asked to make sense not only of particular self-assessment tools, but of the total package of tools they complete.

The point of the reaction statement is to encourage learners to think about the inherent constructs or orientations, reflect upon the ways they choose to perceive themselves, and consider the implications of a particular characteristic, style, or perspective on their lives and careers. The approach has proven successful in helping OB, Principles of Management and Managerial Ethics and Decision Making students make greater sense out of the assessment materials to which they are exposed.

The portfolio approach to learner self-assessment activities is simple and straightforward. As part of the class requirements, learners maintain a portfolio of their self-assessment activities and assignments. For each tool or activity, they are asked to compose a reaction statement that helps them ponder the meaning of a particular score or response to an assessment technique. Near the end of the semester, learners submit these materials for review by the educator. The self-assessment component may be submitted as a portfolio unto itself or as a section of a broader learning portfolio for a class.

The rationale for this paper is that it can help readers and session participants think through their own approaches to learner self-assessment while contemplating a systematic portfolio approach that the authors have experienced. Further, and in a more general sense, we believe that systematic, integrative self-assessment

Developments in Business Simulation & Experiential Learning, Volume 27, 2000

portfolios have merit for increasing learner's abilities and motivations to "Know Thyself".

LITERATURE BACKGROUND ON LEARNING PORTFOLIOS

Ultimately, learning portfolios represent collections and reflections of a learner's work over time (Courtney and Abodeeb, 1999). Learning portfolios, in general, and self-assessment portfolios, in particular, allow learners to personalize their mastery of content knowledge and process learning within a course. Engaging in the reflection needed to build a portfolio is a natural component of the cyclical experiential learning process (Kolb, 1984). The personalization of mastery, within the prescribed or negotiated, guidelines for portfolio construction, can increase learner motivation and enthusiasm.

Yancey (1992) has identified three primary orientations of learning portfolios, including they are longitudinal in nature, diverse in content, and collaborative in ownership and composition. Learning portfolios allow for an integrated assessment of learner performance (Hager & Gonczy, 1994). Depending on the configuration of a portfolio, the teacher will gain access to many difference areas of the learners' performance and competency. Since portfolios are based in the real experiences of the learner, there is greater consolidation of connections between theory and practice (Challis, 1999). Paulson and Paulson (1995) suggest that the use of learning portfolios not only enhances general learning, but also promotes and encourages self-directed learning amongst students.

Mills (1990) affirms that portfolios permit students to reflect upon what is essential to their learning as well as what they have learned, while Romano (1992) has suggested that going through the portfolio creation process is a learning experience unto itself. This perspective is supported by Hill and Ruptic (1994) who feel that reflecting upon learning is what makes portfolios worthy learning tools. Referring to professional

portfolios, Hall (1992) notes that the professional development portfolio is a collection of material that represents the professional's evolution and learning within a profession. At one major U.S. university, portfolios are even used to measure integrative student learning in key skill areas that drive the management curriculum (Magill & Herden, 1998).

Increasingly, dialogue is focusing on self-reflective learning and its relationship to student learning portfolios (Brown, 1998). While portfolios have been widely used in other educational contexts including English, Humanities, Medicine, Teaching, and Psychology, portfolio usage is less evident in management education. A recent article by Chappell and Schermerhorn (1999), while focusing on electronic learning portfolios, supports the notion that such methods are superior to many others in terms of demonstrating a business student's accomplishments and readiness for the world-of-work.

Obviously, our focus on self-assessment portfolios has contemporaneous relevance to experiential educators who are seeking a more holistic means to enhance student learning and to assess learning outcomes. Our perspective is also supported in the general education literature as a necessary means to increase the role of the learner in his/her own learning evolution (Boud, 1992; Falchikov & Boud, 1989).

PORTFOLIO APPROACHES AND MANAGEMENT: BASIC GUIDELINES

In this section, we will establish some of the basics for using portfolios in experiential learning contexts, especially as related to learner self-assessment and awareness.

The Portfolio Process

Using portfolios is an easy process to introduce into one's teaching. You simply need to carve out a chunk of your evaluation points to be given to the portfolio. Given the amount of work that can

Developments in Business Simulation & Experiential Learning, Volume 27, 2000

be generated by involving learners in portfolio creation, a sizeable component of class grade can be determined by portfolio performance. In our experience, we have weighted portfolios at anywhere from 30% to 50% of a learner's total course grade. This heavy weighting of the portfolio gets the learners' attention. It is apparent that the portfolio is a major component of the learning program.

Our experience suggests it is important to provide detailed guidelines for portfolio composition and construction. You should denote the individual sections of the portfolio, specify clear expectations as to the quality of work associated with each section, and provide examples of both "good" and "bad" portfolios. Given your structure, you can then reinforce that learners can be as creative as they wish in going beyond basic structure and expectations. We have also found that it is useful to periodically devote class time to discussion of portfolios and questions related to their progress. Students have a strong tendency to procrastinate and periodic checks of progress help in assuaging this tendency.

In the self-assessment portfolio, learner reaction statements and commentary are the focus of self-awareness and knowledge. You have the choice of using structured versus unstructured reaction formats. Most often we have used unstructured methods with simple instructions that learners should comment on what the assessment tool or activity taught them about themselves. When a structured approach is used, we ask learners to respond to questions such as—What is your reaction to your score or orientation? How compatible is this score or orientation with the way you view yourself? What does this score or orientation confirm or disconfirm about the way you believe yourself to be? What have you learned from taking this instrument/completing this activity? How do you view those who have different characteristics or orientations from you on this characteristic/orientation?

We have found that reaction statements are enriched when instruments are discussed or

debriefed in class. This gives each learner the basic construct understanding to make sense of scores or orientations. Typical debriefing questions would include: What does it mean to be _____? How is your style likely to affect others? What are the pros and cons of your particular style, characteristic or orientation? We also have asked students in "type alike" groups to solve a problem, analyze a case vignette, or discuss the implications of a particular style or orientation. We encourage students to utilize these dialogues and activities as an initial frame for composing reaction statements.

Finally, we must comment on confidentiality. Our experiences suggest that learners often will disclose surprising and very personal aspects of themselves with their portfolios. It is important to reinforce to them that all that material is confidential and will not be shared with or viewed by anyone except yourself.

Our learners seem to like the portfolio approach especially when focused on self-assessment and self-knowledge. We emphasize to our learners that the portfolio approach offers them the opportunity to professionally validate their learnings and leave class with a comprehensive document they can refer to in the future as they continue to learn. While they recognize the amount of work necessary to build a solid portfolio, they seem to appreciate the reality that they are being allowed to demonstrate subject mastery by personalizing the various learnings acquired through the selected assessment tools.

PORTFOLIO EXERCISES AND ACTIVITIES

In this section we will briefly describe some of the methods we use within the self-assessment portfolio approach. As has been noted, many self-assessment tools and activities are included in experientially-oriented texts. We often use these assessment tools in addition to the ones identified in this section. Most methods we describe below have been developed by the authors for use in their various classes. As can be seen, there are

Developments in Business Simulation & Experiential Learning, Volume 27, 2000

many different things that can go into the make-up of a portfolio. One of the pedagogical payoffs of portfolio usage is that you can develop and test new self-assessment tools and actually get feedback on the power of the tool as a self-assessment technique.

The Opinionation Self-Assessment – Learners are asked to enumerate biases, prejudices or stereotypes they hold, define the origin of these beliefs, specify the behavioral consequences of held beliefs, and consider how they respond to other people who hold opinions and perspectives as strongly as they do. The grand purpose of the exercise is to get learners to own some “downside” or shadow aspects of themselves and to consider the effects of learned biases, prejudices, and stereotypes. As a small group activity, this allows learners to compare and contrast their orientations with other learners.

Draw Your “Ideal Leader” or “Ideal Organization” or “Office Politician” Activity – This activity allows learners to make tangible the images they hold in either or all of the three focal areas. By depicting these images in symbol, art, and diagram, they bring forth and project aspects of themselves onto “canvas”. This activity can be done by individuals or by “type alike” groups. Generally, open class sharing and dialogue is the focus of discussion.

Sexual Harassment Self-Assessment – In this exercise, male and female learners are randomly paired up. Each member of a dyad addresses issues in writing issues such as: What is sexual harassment? Why does harassment occur? What can we do to cleanse our organizations of this problem? Dyads then share perspectives as a prelude to open class discussion of the topic.

Career Aspiration/Personal Visualization Activity – This technique allows learners to access their mental imagery and imaginal scripts and study current or future aspects of their lives. “Where Do You Want to Be in 10 Years” is a common career guided imagery script. “Envision Your Ideal Self” is another in which the learners imagine

themselves as they wish they were. Imagery techniques allow learners to dig deeply into their psyches. Many different types of learning have evolved from using these techniques for self-awareness purposes.

Journaling Activities – Journaling is used widely in education and experiential learning. A journal, by definition, is a tool for self-exploration and contemplation. We use a variety of journaling approaches. Journaling has the most potency as a self-assessment, self-development tool if the guidelines for journaling assignments emphasize that the journal writing should focus on the individual and his/her insights, intuitions, learnings, questions, and areas of discomfort or “stuckness”. Journals can be an occasional assignment, although our experience suggests that regular submissions increase the journaling skill of learners.

Personal Vignettes – We have found that asking students to write vignettes based on their life and work experiences can be a valuable addition to a portfolio and a powerful learning tool when used for class discussions. Typical vignettes might focus on topics like: personal double-binds encountered, positive or negative work experiences, ethical dilemmas faced by the learner, the best/worst boss comparison, and many others. Encouraging the learners to specify what they learned about themselves and others as a result of the experience seems to promote increased learner self-awareness.

Imperfect Decision Making Activity – This assignment requires that learners generate a list of individual factors that contribute to “less than perfect decision making”. They initially do this as individuals for class aggregation and discussion. For the portfolio, they rate themselves on the “inhibitory” factors identified through class discussion. Then they specify how they will overcome these factors. For instance, stress is often identified as an inhibiting factor in decision making. For the portfolio, the learner would discuss how he/she manages stress currently and

Developments in Business Simulation & Experiential Learning, Volume 27, 2000

how he/she might better manage stress in the future.

Position Paper Activities – Position papers require that learners consider and write about their stance on a topic or issue. Usually the issues selected for position papers are controversial and allow learners to engage his/her value system in establishing a position. Topics such as whistle-blowing, organizational loyalty, monitoring of employees, decriminalization of drugs, corporate welfare, affirmative action, and legalization of prostitution can produce some amazing and insightful self-studies.

Managerial Interviews – Interviews are a terrific way for students to link learning practice to world-of-work realities. The interview protocol is usually developed as a class exercise. After the questions are fine-tuned, learners do their interviews and transcribe the interview as part of the portfolio. They usually are asked to respond to a number of questions related to their impression of the interviewee.

Reaction Papers – When outside readings are assigned, reaction papers work well to trigger self-contemplation on the part of the learners. The reaction paper can be open-ended, but we feel that structured approaches are preferred to focus the thinking of the learners. We might ask learners to: specify the main premises of the author; indicate those premises they agree and disagree with and explain why; identify two personal learnings they have gained from the reading; and specify two implications of the author's message to their future management practice or organizational experience.

VisionQuesting – In this activity, learners analyze the industries in which they are interested in working after graduation. Analyses focus on competitors, competitive dynamics, driving forces, and important trends that will impact the direction of the industry in the future. Such insights broaden learners' understanding of key

strategic concepts and tools and allow for their subsequent application in the world-of-work.

Systematic Analysis of Strengths and Weaknesses – Using the social learning framework, learners are asked to specify their strengths and weaknesses in the domains of thinking, feeling, and behavior. Then they are asked to specify specific ways and means that they will address and modify any weaknesses.

Standardized Psychological Instruments – There are many of these to choose from and they fit well when learners are asked to both react to their scores and draw implications about what the presence or absence of a trait or preference might mean for them.

Clearly, we are not advocating the use of all of these and other methods in developing a portfolio approach to learner self-assessment and awareness. Rather we are suggesting that experiential educators have many tools available to them for helping learners gain greater self-understanding within a portfolio approach to such understanding.

CAUTIONS

Our typological orientations, two INFPs and an INTP, gravitate against structuring of assignments and specifications. We have found that we have to overcome this tendency and, as noted above, we go overboard in providing detailed instructions and guidance for portfolios. We feel this is appropriate, although it does take considerable time to build the structural guidelines and specifications for portfolios.

Given that self-assessment portfolios do require self-disclosure on learners' parts, we remain sensitive to the reality that some people are reticent about sharing too much personal information. When someone expresses discomfort with the perceived "intrusiveness" of a self-assessment portfolio, we view this as an opportunity to work with the learner to overcome his/her reluctance. We have done a number of

Developments in Business Simulation & Experiential Learning, Volume 27, 2000

“counseling” sessions with reluctant learners and have had good results in helping them work through issues that they may hold.

The final caution we would offer is that review and evaluation of portfolios is very time-consuming. We have had portfolios that are well over 100 pages and processing that much information is challenging. Hence, portfolios work best in classes that are relatively small. Thus, they may be most appropriate for upper-division classes where class size is less than 25.

CONCLUSIONS

Through the use of portfolios in classes where self-assessment and knowledge are central objectives, we have found portfolios to be a superior learning methodology. By picking, choosing, and developing self-assessment techniques and activities, we have exercised considerable creativity. This makes our teaching more intrinsically satisfying. By seeing learners do well with portfolios not only in terms of good grades, but also in terms of feedback, we are certain that self-assessment and other types of portfolios are outstanding pedagogical methods.

REFERENCES

- Brown, W.S. (1998). Power of self-reflection through epistemic writing. *College Teaching*, 46, 135-139.
- Boud, D. (1992). The use of self-assessment schedules in negotiated learning. *Studies in Higher Education*, 17, 185-201.
- Challis, M. (1999). Portfolio-based learning and assessment in medical education. *Medical Teacher*, 21, 370-386.
- Chappell, D.S., & Schermerhorn, J.R. (1999). Using electronic student portfolios in management education: A stakeholder perspective. *Journal of Management Education*, 23, 651-663.
- Courtney, A.M., & Abodeeb, T.L. (1999). Diagnostic-reflective portfolios. *Reading Teacher*, 52, 708-715.
- Falchikov, N., & Boud, D.J. (1989). Student self-assessment in higher education: A meta-analysis. *Review of Educational Research*, 59, 395-430.
- Hager, P., & Gonczi, A. (1994). General issues with the assessment of competence. *Assessment & Evaluation in Higher Education*, 19, 3-17.
- Hall, D. (1992). Professional development portfolios for teachers and lecturers. *British Journal of In Service Education*, 18, 81-86.
- Kolb, D.A. (1984). *Experiential learning*. Chicago: Prentice Hall.
- Magill, S.L., & Herden, R.P. (1998). Using educational outcomes and student portfolios to steer management education. *Journal of Management Education*, 98, 567-591.
- Mills, R.P. (1990). Using student portfolios to assess achievement. *The Education Digest*, 55, 51-53.
- Romano, T. (1992). Multigenre research: One college student. In D.H. Graves and B.S. Sunstein (Eds.), *Portfolio portraits*. Portsmouth, N.H.: Heinemann Educational Publishers.
- Yancey, K.B. (1992). *Portfolios in the writing curriculum*. Urbana, IL: National Council of Teachers in English.