

THE ART AND SCIENCE OF EPORTFOLIO PLATFORM SELECTION

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Assessment Institute in Indianapolis
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PART I: SELECTION CONSIDERATIONS

PUT USER NEEDS FIRST

- ▶ Who are your users and stakeholders?
- ▶ What are their needs and expectations?
- ▶ How will the ePortfolio be used and for what purpose?
- ▶ Focus on functional needs (what they need to do), not technical (how they need/want to do it)
- ▶ Create a needs matrix and prioritize (must have, should have, nice to have) and use it to develop RFI/RFP and evaluate solutions

NEEDS MATRIX

	A	B	C
1	ID	Functional Requirements	Priority
2		Category: Collection (storage, management, and retrieval of digital artifacts)	
3	1	Robust and user-friendly capabilities for uploading, storing, locating, managing, sharing, and viewing files (artifacts) in all common formats, including plain text, video, audio, graphics, databases, URLs to external resources, etc. in a personal online digital workspace/repository.	
4	1.01	Ability to control who has access to one's own intellectual property (artifacts) via permission settings which can be easily understood and changed.	
5	1.02	Ability for managers to configure storage quotas for specific users, groups, or programs	
6	1.03	Ability for portfolio authors to upload, transcode, edit, share, and view digital video and audio artifacts	
7	1.04	Ability for portfolio authors to add metadata to individual portfolio artifacts	
8		Category: Reflection	
9	2	Robust and user-friendly capabilities for creating, editing, and sharing, and discussing reflections on any component (an artifact, group of artifacts, page, group of pages) of a portfolio or on the entire portfolio	
10	2.01	Ability for instructors and facilitators to scaffold the process of writing reflections with prompts or custom forms	
11		Category: Self-presentation (custom free-form or template-based presentations)	
12	3	Robust and user-friendly capabilities for creating, editing, managing, and sharing any number of showcase portfolios and/or other types of web-based presentations	

+ ☰ All Requirements ▾ Functional Requirements ▾

ACQUISITION OPTIONS

- ▶ **BUY**: commercial packages
TaskStream, Digication, Chalk&Wire, LiveText, PebblePad, etc.
- ▶ **BORROW**: open/community source
Mahara, Elgg, Karuta (successor to OSP)
- ▶ **BUILD**: develop a custom application
Career Portfolio (Florida State University) STEPS for Assessment (CSU Chico State)
- ▶ **ADAPT**: use and combine generic tools Google sites, WordPress, Weebly, Wix, etc.

BUY: COMMERCIAL SOFTWARE

Pros	Cons
Fairly mature, if established product	Substantial costs for licensing and maintenance
Feature Rich	Complex
Multipurpose	You may not need or use all features
Documentation and support (including system integration services)	Local documentation and support is still needed.
Works out of the box	Can't easily modify/customize
Some offer hosting (SaaS) and/or on-premise hosting options	Some hosted by vendor only

BORROW: OPEN/COMMUNITY SOURCE

Pros	Cons
No licensing costs	May require investments in developers, tech writers, user support, etc.
Code can be modified	Documentation and testing may not be as thorough
Opportunities to influence and participate in product direction and development	Fewer features and functions than commercial products
Emphasis on interoperability and open standards	No guarantees or service level agreements
	Dependence on community for support and continued development/ maintenance of product

BUILD: DEVELOP CUSTOM APPLICATION

Pros	Cons
Better fit with institutional or programmatic needs and processes	Development and deployment costs and timeline are difficult to predict
Implement a completely new vision or approach	Longer time to deployment
Control over future development and rate of change	Complete dependence on internal expertise

ADAPT: GENERIC WEB AUTHORING OR WEB 2.0 TOOLS

Pros	Cons
Free or very low-cost (Google sites, hosted blogs or wikis)	No support for assessment processes or reporting
Gives portfolio owner creative control	Uncertain future of specific services
Available to students after graduation	

SCOPE AND SCALE OF INITIATIVE

- ▶ University-wide, centrally designed and managed
- ▶ University-wide, distributed design and management
- ▶ Specific colleges and programs only
- ▶ Specific courses only

INTEGRATION WITH OTHER CAMPUS SYSTEMS

- ▶ Single Sign On
- ▶ Student Information System
- ▶ Learning/Course Management System
 - ▶ Today, LTI is a must

COST/PRICING/PAYMENT MODELS

Commercial

- ▶ Site license (fixed annual cost, usually based on campus, college, department FTE)
- ▶ Individual user licensing
 - ▶ Volume discounts
 - ▶ Duration discounts
 - ▶ Student or institution pays

Open source

- ▶ Local support and maintenance
- ▶ Outsource to service provider

OTHER CONSIDERATIONS

- ▶ Compliance with federal, state, campus and program specific security and privacy policies
- ▶ Support for external users (evaluators, reviewers, etc.)
- ▶ Student access after graduation
- ▶ Portability and interoperability
- ▶ Longevity and solvency of vendor

WORDS OF WISDOM

- ▶ Talk to vendors
 - Live demos
 - Test account (try before you buy)
- ▶ Talk to real users
 - Satisfaction with product (strengths, shortcomings)
 - Satisfaction with support
- ▶ Consider piloting more than one product before committing
- ▶ Software is just a tool; it's what you do with it that matters

PART II: THE INDIANA UNIVERSITY STORY

IU CONTEXT

- 8-campus system with flagship, urban, and regional campuses
- Emerging use of/interest in ePortfolios at flagship and regional campuses
- IU-wide University Information Technology Services (UITS)
- Next.IU Initiative

IUPI CONTEXT

- Large, complex urban research institution
- 20 highly diverse schools
- 40+ campus ePortfolio initiatives, each with its own model
- 10 years of experience with previous platform



Anjali Prakash's Development Portfolio

Anjali Prakash's Development Portfolio

Hi there! I'm Anjali Prakash. I am an incoming student majoring in Biology, with a minor in Chemistry at IUPUI. I aspire to be a certain surgeon in my profession. I would be very grateful.

John Fierst • IUPI

About Me • Educational Goals and Plans • Career Goals • Campus and Community Connections

Educational Overview

I am currently in my first year as a Biology major in the Purdue School of Science at IUPUI (Indiana University Purdue University Indianapolis). I have a Bachelor of Science in Biology. I am currently working as a research assistant in the lab of a faculty member. I am planning to continue my education at the graduate level to pursue a PhD in Biology. I am also planning to work for a few years in a laboratory setting after graduation. I am currently working as a research assistant in the lab of a faculty member. I am planning to continue my education at the graduate level to pursue a PhD in Biology. I am also planning to work for a few years in a laboratory setting after graduation.

Work and Volunteer Experience

I am currently working as a research assistant in the lab of a faculty member. I am also working as a volunteer at the IU Health Center. I am currently working as a research assistant in the lab of a faculty member. I am also working as a volunteer at the IU Health Center.

Samantha Bredhold • Kelley School of Business

About Me • Educational Goals and Plans • Career Goals • Campus and Community Connections • Business

Hi! My name is Samantha Nicole Bredhold. I was born on May 2, 1993 in Jasper, IN. I have lived in Jasper all my life, until recently when I moved to Indianapolis to attend IUPUI and the Kelley School of Business. At the Kelley School of Business I plan on majoring in Marketing and possibly Supply Chain Management. Before coming to IUPUI, I attended Jasper High School where I received my Academic Honors Diploma. I have a younger sister, Kaitlin, and a younger brother, Nick. In my spare time I enjoy reading, listening, playing softball, watching movies, and hanging out with my friends. Some of my favorite books would be anything by Nicholas Sparks while my favorite movies include: The Notebook and ZI. I have been playing softball for nine years at my local softball league in my hometown and I hope to continue with it at IUPUI as an recreational sport. My friends are very important to me and I love being able to hang out with them.

Margo Foreman

Public Health/Social Justice Professional

I'm on a mission to help shape the world around us:

- ACTIVELY ENGAGED
- LEADING
- INSPIRING

The idea of public health is not new. I would argue that it is a relatively recent phenomenon. It is a discipline that has evolved over time to address the complex and interconnected nature of public health. This is a discipline that is constantly evolving and one that is essential to the well-being of our society.

I am a professional who is eager to engage in collaborative efforts to make the world around us a better place for everyone. I am currently working as a public health professional at the IU Health Center.

Lynette Sauer Student

Indiana University, Kelley School of Business
Indiana University, Herron School of Art + Design

About Me • Educational Goals and Plans • Career Goals • Campus and Community Connections • Portfolio • Resume

Hi! My name is Lynette Sauer. I am currently a student at Indiana University, Kelley School of Business and Indiana University, Herron School of Art + Design. I am currently working as a student assistant at the IU Health Center. I am also working as a volunteer at the IU Health Center.

THE BIG PICTURE

- Platform selection for eight-campus Indiana University system (IUPUI major user)
- Final selection to be made by system IT organization
- ePortfolio platform selection overlapping selection of new system LMS

I. FORMING A COMMITTEE

- Charge, appointments by UITS AVP in September 2012
- All user types and levels represented, including the most highly invested
- Committee co-chaired by UITS leader and IUPUI director



2. AGREEING ON REQUIREMENTS

- Listed desirable features
- Voted, discussed, verified, reached consensus on each element
- Used LMS project site for resource access & archive, videoconference for meetings
- Homework: AAEEBL and EPAC online demos, LMS pilot vendor demos

IJ 2013 Delineation of ePortfolio Platform Requirements*

Category	Requirement	Must Have	Should Have	Could Have	None	Not Sure	Other
Category	Collection (Storage, management, and retrieval of digital artifacts)						
1.0	Ability to use artifacts and collections to analyze portfolio and prepare self-reflection responses						
1.1	Ability to use artifacts and collections to analyze portfolio and prepare self-reflection responses						
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1.50	Ability to use artifacts and collections to analyze portfolio and prepare self-reflection responses						



3. PREPARING AN RFI

- Adapted standard template from Purchasing Office, finalized requirements list, added technical specifications from UITS
- Issued June 30, responses due July 31

B. Required Information

Each responding company should provide the following:

User and System Requirements

1. Collection (Storage, management, and retrieval of digital artifacts). This system must provide storage and management capabilities for artifacts, including: creating, editing, deleting, and moving artifacts; and all other features: history, search, view, and print. *Note: The system must be able to handle artifacts of all types (e.g., text, audio, video, images, etc.) and must be able to handle artifacts of all sizes (e.g., large, medium, small, etc.).

1.1. Ability to control who has access to user's own individual portfolio (artifact) via permission settings that can be easily understood and changed.

1.2. Ability to portfolio artifacts to control digital audio and video artifacts (and the workflow in place within other than individual portfolios).

1.2.1. Does your system handle and support digital audio and video?

1.2.2. Does your system offer workflow (streaming or progressive download)?

1.3. Handling personal storage space and the ability to adjust quotas to accommodate users and programs with special digital needs.

1.4. Ability to add metadata to individual artifacts.

1.5. Ability to group and query portfolios, artifacts via tagging, folders, collections, etc.

1.6. Can artifacts be moved, renamed, or deleted?

1.7. Does your system offer a search feature for locating artifacts in the collection?

2. Reflection. This system must provide robust and user-friendly capabilities for creating, editing, sharing, and displaying reflections on any combination of artifact, group or collection, group of artifacts, or portfolio or in the entire portfolio, including:

2.1. Ability to reference and link back to reflect the process of writing reflections with prompts or custom forms.

2.2. How does your platform distinguish reflections from other types of artifacts that the user might create with your system?

2.3. Can individual reflections be shared and discussed with or commented on by other users?



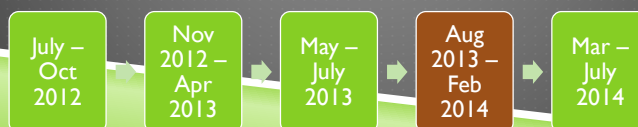
4. REVIEWING RFI RESPONSES

- Received 7 responses, 1 incomplete
- Used similar survey form for all members to review/rate each response on each criterion
- Discussion identified clarification questions, narrowed “final” pool to four vendors



5. CUSTOM PRESENTATIONS FROM FINALISTS

- Prepared two scenarios (using Sakai experience)
- Each “finalist” prepared two-hour presentation based on scenarios (recorded for later review)
- Final discussion, consensus on recommendations to UITS



6. PREPARING RFP AND RECOMMENDATIONS

- Ranked final four candidates
- Purchasing and UITS prepared final RFP (streamlined from RFI)
- UITS negotiated contract with vendor and announced selection—Taskstream—at end of July



LESSONS LEARNED

- Get as much campus experience as possible before beginning selection process.
- Seek a mix of expertise, perspectives, and experience when appointing committee members.
- Allow enough time for a careful review of ePortfolio products.
- Solicit custom demonstrations in the final stages of selection process.
- Ensure support and involvement of administration, IT organization, faculty.

FOR MORE INFORMATION:



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