

SOUTH AFRICAN COUNCIL FOR EDUCATORS

Supporting educators in compiling ...

Professional Development Portfolios

Report on the process of developing guidelines
for school-based educators in compiling
professional development portfolios

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The South African Council of Educators (SACE) is a professional body aimed at enhancing the status of teaching and learning, to promote the development of educators and their professional conduct. Towards these aims, one of three sections within SACE is the Professional Development Section, which aims to support the continuous professional development of all educators.

In supporting the continuous professional development of educators, the Professional Development Section of SACE has introduced the Professional Development Portfolio with a twofold purpose. Firstly, and foremost the professional development portfolio is intended to engage educators in a process of ongoing professional development that enhances teaching and learning processes. Secondly, the professional development portfolio provides educators with an opportunity of collating a range of evidence that reflects their ongoing professional development.

SACE has to date engage in two phases of promoting the compilation of professional development portfolios amongst educators in South Africa. The first phase involved the launch of the Professional Development Portfolio Project as a pilot phase of introducing educators to processes of compiling the professional development portfolios in all nine provinces of South Africa. Drawing on experiences and insights developed through this pilot project, the second phase involves develop broader processes of support for educators in compiling their professional development portfolio. The first stage in this second phase has involved the development of a set of guidelines that would support educators in compiling their professional development portfolios through a process of self-study.

This document reports on this initial stage of the second phase. It focuses specifically on the processes involved in developing the guidelines that would come to be used in further supporting educators to engage with processes of, and compile their professional development portfolios. Firstly, it provides a broad sketch of the pilot project, some of the insights gained through this pilot phase and how these insights have come to inform the guidelines developed through the initial stage of the second phase. The report then also provides an overview of the processes through which the guidelines were developed and then also provides some insight into the links of these guidelines within the broader policy framework for the professional development of educators. It then provides the detail of the guidelines to support educators in compiling their professional development portfolio and in conclusion highlights some recommendations that might better support educators in engaging in processes of compiling their professional development portfolios as well as generate deeper insights into how educators engage within these processes.

In November 2002 SACE's Professional Development Portfolio (PDP) Project was launched. To date the project has been introduced to a sample of educators across all nine provinces in South Africa over a period of three years. The intention with this project is to encourage all educators to *take responsibility for their own professional development* through the compilation of professional development portfolios.

The PDP Project was launched through a wide scale process of advocacy around the professional development portfolio, exploring its role and purpose in supporting the ongoing professional development of educators. The process of advocacy was undertaken through various publications, amongst others, *The Teacher*, *The Educators' Voice* and the *SACE Newsletter*.

Following this process of advocacy, the project was implemented through engaging educators in a series of three workshops spaced six months apart. Drawing on the *Professional Development Portfolio Training Manual* developed by the SACE Professional Development Section, facilitators explored with educators, in more detail the purpose of the professional development portfolio and engaged them with a series of steps towards compiling evidence of professional development in their portfolios.

In the first year of the PDP project, over 400 educators from Mpumalanga, Limpopo Province and Gauteng participated in the project. In the year following initial implementation the project was extended into the Free State, Kwazulu Natal and North West Province and is currently (in 2005) being implemented in the Eastern Cape, the Western Cape and the Northern Cape. Evaluations undertaken as part of the project reflect that most participating educators note the positive experience of developing their professional development portfolio in supporting their ongoing professional development and practice, reflected in the statements below.

'[Through developing a professional development portfolio] I discovered who I am, why did I do this in the past that is still shaping my career. This is actually a mirror [that] I see of myself. I now know my strengths and weaknesses'

'Developing my own [professional development portfolio] has been a great experience because it made me realise that I have accomplished so many things in my teaching career. It ... helped me ... discover my strengths as well as my weaknesses. It made me ... work on my weaknesses and try to improve on them. My strengths helped me to boost my self-esteem.'

'I discovered who I am ... why did I do this in the past ... [what] is ... shaping my career. This is actually a mirror I see [of] myself. I now know my strengths and weaknesses.'

'[Developing a professional development portfolio] gave me an overview to assess my own strengths, weaknesses and areas needing to be developed ... I have discovered that learning is an ongoing process and it never stops'.

From the evaluation noted above, various insights were gained, into how educators engaged with the process, some of the strengths that they experienced and some of the challenges with which they were confronted in compiling their professional development portfolios. These experiences, and insight derived have been drawn on in informing the development of guidelines as reported on in this document. Other insights relate more specifically to processes of support to educators in compiling the professional development portfolio. These have been drawn on in the development of specific recommendations to support the ongoing professional development of educators through the compilation of professional development portfolios.

Insights informing the development of guidelines

- ★ *Emphasis on documentation.* For many educators involved in the pilot project, evaluations reflect greater emphasis on documentation of professional development and there appears to be less emphasis on the link between professional development and professional practice (within the classroom, school, community and professional context).
- ★ *Reflections on participation in prior professional development.* Linked to the point above, many educators appear to have valued the opportunity for reflection. Though in describing processes of reflection, many educators appear to focus on reflections on their academic career and participation in previous professional development programmes, again highlighting less emphasis on linking professional development and practice. This similarly reflects less emphasis on the notion of reflective practice as being promoted within educator professional development programmes.
- ★ *Challenges of accessing necessary documentation.* Many educators note the challenge of accessing the necessary documentation with which to compile their portfolio such as certificates and diplomas. There appears in this regard to be an emphasis on externally generated documentation and less emphasis on achievements, growth and / or development through self-generated evidence.

- ★ *Deciding on evidence to include.* Many educators note the difficulty in trying to decide which evidence needs to be included in their portfolio and then how to organise and display this evidence in the portfolio.
- ★ *Time management in compiling the portfolio.* Most educators note the challenge of time management in compiling their professional development portfolio.

These aspects have all been considered in the compilation of the guidelines to support educators in compiling their professional development portfolios. For example, in responding to the issue of less links between professional development and practice, the guidelines encourage educators to consider the implications of professional development for their professional practice. In response to the difficulty of accessing externally generated documentation, educators are, through the guidelines encouraged to include self-generated evidence of their professional and personal development, together with externally generated evidence. In line with issues of time management in compiling the portfolio, a proposed time frame for compiling the portfolio is proposed within which educators engage in various activities over a period of one year to compile an initial portfolio and subsequently update this portfolio relative to their engagement in new and different activities. More details of integrating these insights are discussed together with the broader guidelines to compiling the professional development portfolio.

Insights informing recommendations for processes of support

- ★ *Value in processes of support.* Many educators noted the value in the support that they received from SACE officials in compiling their professional development portfolios. This highlights the critical need to design some areas of support for educators in compiling their professional development portfolios.
- ★ *Willingness of pilot group to support.* Many educators felt that through participation in the pilot project they had developed the competence to compile their own professional development portfolios and many reflect a willingness to support other educators in their districts / regions / schools in compiling their portfolios.

These issues of support were similarly taken into consideration in formulating the guidelines as a self-study pack that would support educators in compiling their professional development portfolio. These insights have further informed the recommendations made for supporting educators in the process of compiling their professional development portfolio, discussed at the end of the document.

From the above, the pilot project had provided valuable insights to inform the development of further processes of supporting educators in taking responsibility for

their own professional development and so attempt at supporting an improvement in educators' professional practice and teaching and learning processes which they enable and engage with.

PROCESS

The guidelines to support the compilation of the professional development portfolio amongst educators were developed through a process encompassing four phases, discussed below.

Phase 1: A review of the PDP pilot project

During this first phase in developing the guidelines to support the compilation of professional development portfolios a review was undertaken of the pilot phase of the PDP project. This review was undertaken through a process of document analysis of documentation generated through the pilot project and through interactive discussions with participants in this pilot project.

★ A review of documentation generated

Various documents were reviewed to gain deeper insight into the aims and intentions of encouraging educators to compile professional development portfolios, educators experiences in engaging with processes of compiling their professional development portfolios and some of the strengths experienced and challenges with which educators were confronted in compiling their professional development portfolios. The documents analysed include:

- three SACE newsletters focussing on supporting the compilation of professional development portfolios;
- the *SACE Professional Development Portfolio Training Manual*;
- evaluations completed by educators participating in the pilot project;
- examples of educators professional development portfolios.

Rather than seeing the development of guidelines that support the compilation of professional development portfolios in the second phase as separate from the pilot project, all documentation reviewed was drawn on in developing these guidelines. For example, many educators found it useful to articulate in their professional development portfolios, their teaching philosophy. As such, this activity was integrated into the guidelines. Some educators struggled initially with understanding the purpose of the professional development portfolio and the guidelines were developed cognisant of this struggle and attempts at providing a clearer outline of the purpose and intentions

of the professional development portfolio. Other examples are reflected in discussions in the former section.

★ ***Interactive discussions with participants***

To further inform the process of developing guidelines for compiling professional development portfolios, interactive discussions were held with a sample of participants in the pilot project. These interactive discussions involved the exploration of various questions about the pilot project and discussions of some proposals for the guidelines.

Discussions with Facilitators

On 11 April 2005, I held interactive discussions with Ella Mokgalane (Professional Development Manager – SACE) at the SACE offices in Centurion, Pretoria. These interactive discussions focussed on specific questions and discussions around some suggestions for the portfolio guidelines derived from the process of document analysis. A guide to these discussions is attached as appendix A. Through these discussions, an attempt was made to clarify the intentions and purposes of the professional development portfolio in the context of SACE's aims to support the ongoing professional development of educators. Some questions also explored some of the more practical aspects of supporting educators in developing the professional development portfolio, for example, resources and stationery offered to educators to support the compilation of their portfolios, processes of support for compiling their professional development portfolios, amongst others. In addition, some initial suggestions were made, and discussed to inform the structure, format and contents of the guidelines.

Some suggestions made for the portfolio guidelines include:

- A recommendation of two possible formats for the guidelines, either a guidelines booklet or a loose-leaf portfolio pack with which educators would interact in compiling their portfolio. The favoured format was a combination of these two, with a booklet encompassing broader guidelines and a loose-leaf pack that enables the educator to complete various forms, questionnaires and reflective sheets towards compiling their professional development portfolio.
- A recommendation for three specific focus areas for the portfolio, namely the teaching and learning context, professional practice and professional development. It was however noted that these three sections were proposed purely for the organisation of the portfolio and in the development of the guidelines an integrated approach would be fostered to encourage educators to reflect on the links between the teaching and learning context, professional

development and practice. Ella agreed with this possible focus and agreed that it might address the overemphasis on static and documentary evidence and encourage educators to begin to reflect on their professional development and practice and the link between the two. One suggestion made in this section was for the consideration of the performance standards to be used in the Development Appraisal System and Performance Management within the Integrated Quality Management System (IQMS). These ideas were noted to inform the further development of the guidelines.

- Recommendations were made for various content to be included in the professional development portfolio linked to the three focus areas (see appendix A). These recommendations, agreed on through these discussions, included the contents of the portfolios proposed through the pilot project, for example, certificates, diplomas, teaching philosophy, amongst others. It however, extended beyond this evidence to also include some reflections on practice, for example, lesson plans developed and used, assessment processes used and assessment records generated, learner and classroom profiles and school and community profiles, amongst others.
- Recommendations were made for proposing a time frame for the development of the professional development portfolio for example, over one year with specific activities engaged with in each school quarter. Ella felt this was a good idea to address issues of time management and further suggested that this time frame be linked to the proposed time frame for the IQMS. This was noted and integrated into the proposed guidelines.
- Recommendations were made to include in the guidelines some processes of review that support educators in the compilation of professional development portfolios, for example peer review processes. These recommendations were agreed with, noted and integrated into the guidelines to support the compilation of professional development portfolios.

Discussions with Educators

Interactive discussions were also held with a group of educators who had participated in the pilot project. On 12 April 2005, 29 educators participated in a workshop held at the Manhattan Hotel in Pretoria between 09h00 and 13h00. See Appendix B for the list of attendees at this workshop. Various questions were explored with educators and the proposals to inform the guidelines were similarly discussed with them. Appendix C reflects an outline of questions and discussions that guided the workshop.

The first question explored with educators during this workshop was the purposes of compiling a professional development portfolio and some of the suggested contents for this portfolio. The intention with these questions was to inform the development, and

clarification of the purpose of the process of compiling professional development portfolios. Some responses from educators include, amongst others:

'A collection of achievements, weakness that require development, learning through a period of time that is kept for record purposes to ... inspire you in what you may want to achieve in future and what you have achieved'

'Systematic documentation of your milestones in your professional career'

'It is a personal file where your achievements, plans and areas that need development are kept. It will tell people who you are, highlight strengths and weaknesses, ongoing record'

'A collation of educators evidence indicating different professional development stages over time'

Generally, educators noted the portfolio as a collection of evidence that reflects growth over a period of time, and highlights strengths and areas that require attention for further development. Though as noted before, most educators reflect here on their professional development and few note their practice, explicitly as part of their growth, development, strengths and weaknesses.

However, in a review of some of the suggestions that educators make for the contents of the portfolio, some of them do begin to allude to professional practice through some of the specified contents, such as *'... lesson plans, learning programmes, [evidence that reflects] specific responsibilities as educator – learning area plans, HOD responsibilities'*. As noted before there appears to be a stronger emphasis on static evidence, such as *'... awards, certificates, qualifications, curriculum vitae, letters from learners, educators, superior and community members, teaching philosophy'* amongst others. Some educators also made suggestions for the contents to include photos of themselves, their school, events and learners amongst others. These suggested contents were used to compile the guidelines for compiling professional development portfolios.

The workshop further explored some of the challenges with which participants were confronted in the compilation of their professional development portfolios. Some of the more general challenges noted include time management in developing the portfolio, the selection of relevant material, the organisation and structure of the portfolio, access to computers with which to develop materials for inclusion in the portfolio. Some educators noted the need for ongoing monitoring and evaluation of the portfolio

through its development. And two educators noted the need for more reflective work in compiling the portfolio. All these issues were noted and addressed through the development of guidelines to support the compilation of materials, some of which are discussed above.

A third session in the workshop focussed on reflective activities where educators were encouraged to describe their interpretations of reflection and the purpose of engaging in reflective activities. Some responses include '*... looking back with the aim of doing what you did better ... improvement, development, growth*' and '*... identify areas [requiring] development*'. Educators were further encouraged to engage in three reflective activities, the first one being an open-ended and unguided reflective activity focussed on a lesson recently taught in their classroom context, the second using a reflective clover with some leading statements to guide reflections and a third activity with structured questions around a lesson recently taught. An analysis of these reflections shows that in the first activity focussing on unguided reflections, educators provided detailed descriptions of the lessons taught with less emphasis on why they had made certain decisions. Few interacted with the reflections enabled through the reflective clover. More depth in reflections was evident in the third activity that posed specific questions to educators about the lesson taught. From this it became evident that the focus on reflections in the portfolio would be better engaged with if clearly guided and structured, a point noted and integrated into the guidelines to support the compilation of professional development portfolios.

In a fourth and final session, educators were engaged in discussions around the suggestions made for the guidelines to compiling the professional development portfolio, as discussed above in the interactive discussions with the facilitator. From these suggestions, educators agreed with integrating the bound broad based guidelines with more specific guidelines in a loose – leaf portfolio pack. Educators felt that this format would address the challenge of selecting appropriate material for their portfolio and structuring and organising their portfolio. Participating educators agreed with all recommendations made and discussed above, though they felt strongly that the focus and content of the portfolios need to make provision for extra and co-curricula activities and not focus only on classroom practice. These concerns and inputs were noted and integrated into the guidelines.

Another issue emerging through discussions with educators in this forum was the possibility of developing guidelines that could be used for office-based educators. However, given the difference in focus in key performance areas between educators at different post levels at schools and those in office-based positions, this forum agreed to focus the process initially on developing guidelines for school-based educators. At a

later date, guidelines to support office-based educators in compiling their professional development portfolios could be explored.

All insights gained through the process of document review and interactive discussions with participants in the pilot project were drawn on in the compilation of *Guidelines for Compiling Professional Development Portfolios: A Resource for School-Based Educators* in draft format.

Phase 2: Developing guidelines in draft format for comment

The *Guidelines for Compiling Professional Development Portfolios: A Resource for School-Based Educators* was developed in two parts.

The first part includes an introductory note to educators, a background to the guidelines, a broad overview of the guidelines and its structure and some suggestions on how to use the guidelines. It then also explores the purpose of the professional development portfolio and emphasises not only the professional development portfolio as product of evidence but also as a significant process through which professional development is supported and enabled. It then provides a broad sketch of the structure and contents of the portfolio and provides some guidelines for processes that might support educators in compiling their professional development portfolio, for example, some suggestions for time management and processes of peer review. This first part is proposed as a bound booklet of broad-based guidelines complemented by more specific guidelines contained in a loose-leaf portfolio pack, which makes up the second part of the guidelines.

Part two was proposed as a set of loose-leaf sheets that make up the actual portfolio. This loose-leaf pack consists of various forms, templates, questionnaires and reflective sheets that the educator would complete and compile within their professional development portfolio. Linked to the various forms, templates, questionnaires and reflective sheets are the provision for compiling *Pockets of Evidence* as they relate to various sections of the portfolio.

Part two of the portfolio pack is structured around three focus areas, including the teaching and learning context, professional practice and professional development. Section 1, dealing with the teaching and learning context allows educators to describe the classroom, school and community context within which they teach and which shapes their practice. Section 2 provides a space for educators to reflect on their professional practice, both inside and outside of the classroom. Section 3 of the portfolio focuses on educators' participation in professional development processes and includes some reflections on the implications for participation in professional

development processes for the professional practice of educators. Section 4 focuses on processes of reviewing the professional development portfolio.

Reflections in the portfolio are structured around four policy initiatives supporting continuous professional development amongst educators and an improvement in teaching and learning, namely:

- ★ *Integrated Quality Management System (IQMS)- Collective Agreement No. 8 of 2003*

Drawing primarily on the Development Appraisal System and the Performance Management System in the IQMS, reflections were structure primarily around the performance standards defined for use within these programmes. Some of the evaluation criteria were drawn on to inform the reflective questions developed. Though in some cases the performance standards and the evaluation criteria were revised somewhat for the purposes of clarity. Some of these performance standards and their associated evaluation criteria were found to be fairly vague, for example, *creating a positive learning environment*. Reflective questions were then developed to encourage educators to reflect on ways in which they were able to create a positive learning environment within their particular context and educators were asked to clarify what they regarded as a positive learning environment and why. In this way the performance standard, rather than relying on purely an outside assessment of what constitutes a positive learning environment are given the opportunity to motivate for the contextual choices made in creating a positive environment within their teaching and learning context. In another example, the performance standard that deals with both the aspect of educators' interactions within the school community as well as their contribution to the development of the school as a whole was found to address two significant and equally important aspects of professional practice. It was felt that these two aspects (integrated into one performance standard) would be better dealt with as two separate reflective themes. Other performance standards were however retained as reflective themes in this section and were complemented by other aspects drawn and developed from other policy initiatives.

Another aspect drawn on from the IQMS is the time frame within which to engage with processes of compiling a professional development portfolio. The IQMS for example, defines one calendar year within which self - assessment is undertaken, a professional growth plan is developed and the educator prepares for an external evaluation. The time frame suggested for the compilation of the portfolio was integrated into the IQMS requirements thus intending to support educators in engaging within processes of Development Appraisal and Performance Management.

A further aspect of the IQMS that was integrated into the portfolio guidelines is the development of a professional growth plan that informs further professional development processes. In section three of the guidelines, educators were encouraged to develop a professional growth plan and to comment on their achievement on some of the stated outcomes.

The proposal of support from a Development Support Group (DSG) convened within the school context in supporting Development Appraisal and Performance Management was integrated into the guidelines to compiling professional development portfolios. Educators are encouraged, through the guidelines, to draw on this DSG for support in the ongoing monitoring, evaluation and review processes of compiling the professional development portfolio.

★ *The National Teacher Education Framework - Draft Discussion Document, 2004*

From the National Teacher Education Framework, recommendations made on the different types of professional development processes within which educators could engage in supporting continuing professional teacher development were drawn on. For example, research activities, enabling participation in research activities to improve teaching and learning and to conduct an action research programme to address specific issues in your school / classroom / community. These options were outlined in the guidelines to provide educators with various options of engaging in continuous professional development. These options were also noted to allow educators to reflect on the range of professional development activities which they might have engaged with in their professional practice that might have contributed to their professional development and practice.

★ *The Norms and Standards for Educators - Department of Education, 2000*

A review of the roles defined for educators was undertaken to ensure that these are all integrated into the guidelines for compiling professional development portfolios. For example, one of the roles defined Scholar, researcher and lifelong learner was thought to be integrated throughout the portfolio through ongoing processes of planning, implementing and reflecting on various aspects of an educators' professional practice. All other roles were seen to be integrated throughout the portfolio.

★ *Roles and Responsibilities for Educators - Resolution No. 8 of 1998*

A review was undertaken of the roles and responsibilities of educators to consider the key performance areas of educators at different post levels. In the guidelines, focussed

reflections were then developed around what is expected of educators relative to these key performance areas.

Further links within these different policy initiatives are discussed below in providing a more detailed outline of the *Guidelines for Compiling Professional Development Portfolios: A Resource for School-Based Educators*.

In reviewing the initially developed set of guidelines for all educators it became apparent that the key performance areas and some of the detailed activities with which educators engage in the school context differ in relation to specific post levels. Based on this review a decision was made to develop three different sets of guidelines in relation to the different post levels. The generic set of guidelines compiled in booklet format would be the same for all educators across all post levels. The loose-leaf packs were revised to include a focus on three different post levels, namely:

- ★ Post level one educators – focussing on classroom practice and engagement in extra- and co-curricula activities;
- ★ Post level two educators, like Heads of Departments or Acting Heads of Departments – with an additional focus on management within a specific learning area / phase / grade;
- ★ Post level three educators, Deputy Principals and Principals in which case the guidelines focus more on issues of managing the school.

Some areas of focus in the guidelines for compiling professional development portfolios are generic to educators at all levels, for example, some aspects of the teaching and learning context, personal biographies, participation in previous professional development processes. These general areas of focus were retained in the adaptation of the guidelines in line with different post levels. The areas of difference are mainly in section 2, the section that deals with the educators' professional practice and in relation to the various key performance areas outlined in this section.

Phase 3: Circulating drafts for feedback

The three sets of guidelines were printed, compiled and disseminated amongst various interest groups for their critical input on the guidelines developed in first draft. These three sets of guidelines were circulated amongst:

- ★ SACE officials;
- ★ Teacher Unions;
- ★ A sample of educators who had participated in the PDP pilot project and in the interactive workshop to inform the development of the guidelines

These various interest groups were given three weeks within which to comment on the proposed guidelines for further revision. Feedback received from these interest groups within the requested time frame was limited.

Only two educators who had participated in the pilot project forwarded comments on the guidelines after three weeks. These educators largely commended the guidelines that had been developed and felt that it covered a broad spectrum of aspects and activities that contribute to developing a 'picture' of the educator, their professional development and practice. Some of the suggestions made by these two educators was for the guidelines for Deputy Principals and Principals to focus more strongly on issues of managing the school and to possibly lessen the focus on classroom practice. Other suggestions made were for the inclusion of more space in the some of the reflective sheets, to allow for educators to '... freely express themselves'.

Other interest groups noted that they would forward additional comments closer to the end of June, 2005. However, due to time constraints the available comments were used in the rework of the guidelines and any subsequent comments received will be integrated at a later date.

At a meeting, one SACE official shared comments on the guidelines. Comments were noted in writing in the text of the guidelines and some of these discussed at the meeting. Some of these comments included:

- The need for a glossary to clarify some of the more complex and dense terms that has been used in the guidelines;
- Suggestions for strengthening some of the various templates, forms and reflective sheets included in the guidelines;
- Some suggestion for more effectively dealing with some of the performance standards drawn from the IQMS;
- Some suggested grammatical changes;

Phase 4: Reworking the guidelines

Comments received from these interest groups were noted and integrated into the final draft of the guidelines. Some of the changes made include:

★ In Part 1

- Attempting to more clearly articulate the role and purpose of the professional development portfolio in supporting various policy initiatives being undertaken in the school contexts, for example Development Appraisal and Performance

- Management as part of the IQMS, the Roles and Responsibilities for Educators and the roles for educators articulated in the Norms and Standards for Educators.
- The inclusion of appendix 1 to 3, which outlines the roles for educators, articulated in the Norms and Standards for Educators, Roles and Responsibilities for Educators and performance standards and associated evaluation criteria to be used in the Development Appraisal and Performance Management in the IQMS. These appendices were included and educators referred to them in the introductory texts of part 1, to enable a clearer understanding of what is expected of educators within these various policy initiatives and so too in the compilation of the professional development portfolio.
 - The inclusion of a glossary in appendix 4 through which to clarify various terms and concepts used throughout the guidelines document.

★ **In Part 2**

- Various changes were made to the guidelines for post level 1 educators, as recommended through the process of getting feedback from interest groups as discussed above;
- Some changes were made to the guidelines for post level 2 educators (Heads of Department and Acting Heads of Department), to bring these in line with changes made to the post level 1 guidelines and in response to feedback received;
- Substantial changes were made to the guidelines for post level 3 educators (Deputy Principals and Principals) so as to reflect a stronger focus on issues of managing the school and less focus on classroom practice.
- To distinguish the three sets of guidelines from each other and to ensure that educators use the set appropriate to their post level, an icon was suggested for use in each set of guidelines, to be inserted as a footer at the bottom of each page of the Part 2 guidelines.

GUIDELINES TO SUPPORT THE COMPILATION OF PROFESSIONAL DEVELOPMENT PORTFOLIOS: A RESOURCE FOR SCHOOL-BASED EDUCATORS

The *Guidelines for Compiling Professional Development Portfolio: A Resource for School-Based Educators*, developed in final draft consists of:

Part 1

As discussed before, Part 1 consists of broad-based, generic guidelines for all educators, aimed at encouraging a better understanding of the purpose and role of the professional development portfolio and providing a broad overview of the process of compiling a professional development portfolio (see appendix D). The following sections make up part one of the guidelines:

- ★ Part one provides an **Introductory Note to Educators**. In this introductory note, the professional development portfolio is discussed within the context of the Professional Development Section of SACE aimed at supporting the ongoing professional development of educators through the compilation of the professional development portfolios. It outlines the intention of the guidelines as a self-study pack to encourage educators to take responsibility for their own professional development and introduces educators to the four policy initiatives, as noted before, that have informed the development of these guidelines.

This introductory note then provides educators with some background to the portfolio guidelines through a brief description of the pilot project undertaken between 2002 and 2005 (as described in the background above) and highlights some statements that reflect the value that other educators have experienced through the process of compiling their professional development portfolios.

These introductory notes then go on to describe this process of compiling professional development portfolios as a support process to ongoing professional development of educators and briefly introduces the structure and format of the guidelines and suggests some ways in which educators might use the guidelines in compiling professional development portfolios.

- ★ The second part of these broad-based guidelines in part 1 explores the question, **what is the professional development portfolio?** In the evaluation process, some educators have noted the need for better clarity around what the professional development portfolio is and its purpose. Further, from comments made during the evaluation, most educators appear to refer to the professional development portfolio mostly in terms of the product and what it reflects about them as educators. In this sense, the portfolio appears to be closer to an extended curriculum vitae. Given the intention of SACE to support the ongoing professional development of educators through encouraging the compilation of a portfolio, three purposes for the professional development portfolio are outlined in Part 1. These include:
 - 'The process of compiling the portfolio encourages you (the educator) to take responsibility for your own professional development and practice and **supports you in developing professionally**;
 - The process of compiling your portfolio encourages and supports you in **developing as a reflective practitioner** continuously striving towards enhancing and improving your practice;
 - The portfolio in its tangible form provides **a collection of evidence** that reflects your professional development over a period of time and the implications this holds for your practice'.

As such the purpose outlined emphasis both the product of a professional development portfolio as reflecting evidence of growth, and similarly *the process* through which the portfolio is developed, seen as one of support in exploring new and better ways of engaging in the profession.

Relative to the purposes of the professional development portfolio as envisaged through the guidelines, Part 1 of the guidelines also introduces the educator to the three proposed sections for the professional development portfolio and the contents likely to be integrated into these three sections. This section in particular argues for an integrated approach to compiling the professional development portfolio and in seeing the three sections of the portfolio (the teaching and learning context, the educators' professional practice and the educators' professional development) as three integrated components shaping each other and teaching and learning processes in schools.

- ★ The third section in Part 1, deals with some of the more practical details of **compiling the professional development portfolio**, in response to some of the challenges that educators noted in the evaluation that emerged through the process of compiling their professional development portfolios. This section deals with issues of time management and suggests a potential time frame within which to compile the professional development portfolio. It similarly provides educators with some options for support that they might draw on in compiling the professional development portfolio, which seeks to address the challenge of the need for ongoing monitoring and evaluation of the portfolio through its development.
- ★ Part 1 also includes four appendices. Appendix 1 to appendix 3, as noted before, outlines the roles and responsibilities of educators implied through various policy initiatives, included to provide educators with a clearer idea of what is expected of them as educators. These appendices are also intended as a frame of reference for educators within which to plan and engage with professional development activities. Appendix 4 includes a glossary of terms and concepts used to ensure clarity amongst educators as to what the various terms and concepts mean as used in the guidelines.

Part 2

As noted before, Part 2 consists of more specific guidelines to compiling the professional development portfolio and has been developed in three sets, one for each of the three post levels at schools. The following section discusses the contents of the guidelines for post level one educators. Reference is then made to any difference in particular

sections in relation to the post levels. If no reference to difference is made, it should be assumed that these guidelines are the same for the three sets.

As noted before, Part 2 consists of a set of loose-leaf guidelines with which to compile the professional development portfolio. Some of these loose-leaf sheets contain more specific guidelines as they relate to different sections in the professional development portfolios and others are the actual forms, templates, questionnaires, reflective sheets and pockets of evidence that make up the professional development portfolio (see appendix E – G). These two types of loose-leaf forms are distinguished from each other by both the colour of paper on which they are printed and in terms of the font used for the text in these. This detail about the two types of loose-leaf sheets in Part 2 is shared with educators in Part 1 of the guidelines, when discussing the structure and format of the guidelines.

- ★ The introduction to Part 2 provides the educator with **general guidelines in organising the professional development portfolio**. This section deals for example, with completing a cover page for the portfolio, dividing the portfolio into four sections using the interleaves provided, and provides a broad overview of the different contents within each section. This is followed by a brief discussion on the value of developing a table of contents for the portfolio. A template is included through which educators could develop a table of contents, outlining the various pieces of evidence in their portfolios and preparing a page reference for each piece of evidence.

- ★ The next section of Part 2, provides more specific guidelines for the compilation of **section 1** of the portfolio focussing on the **teaching and learning context** of the educator and learners with whom they engage. This section includes:
 - A *personal introduction* of the educator and provides educators with a range of questions to consider in constructing this personal introduction, including amongst others, 'I am... , I grew up in ... , I really enjoy... and I dream of ... '. Following this a blank form is provided on which educators could construct their personal biography and a space in which to paste a personal photograph. The intention with this section is to emphasise the personal nature of the portfolio and the educator who compiles it.

 - *My curriculum vitae*, in which educators are provided with some more specific details on compiling their curriculum vitae, followed by a template in which to construct their curriculum vitae. This template makes provision for educators to note their personal details, their professional and academic qualifications, their secondary qualifications, their professional experience, associations with various

organisations / bodies / institutions / etc. with which they are involved and for listing some references.

- *My personal biography and teaching philosophy* which focuses the educator on themselves within the profession and some of the values, attitudes, visions and goals which they hold for themselves, their learners, the school and community. These guidelines provide the educator with various questions through which to construct this personal biography and teaching philosophy on a blank form included in the guidelines. These questions include amongst others, 'how have you come to teach in a particular learning area (s), grade (s) or phase(s), for how long have you been teaching in this learning area (s), grade (s) or phase(s), what are some of the factors that have shaped your career as an educator and how, what are some of the visions and goals that you have for yourself as an educator and your learners?'. In the guidelines for post level two some questions are included that relates to the Head of Department managing a particular learning area, grade or phase. This adaptation includes some questions such as ' how many educators are in your department, what are some of the processes of support offered to these educators, what are some of the challenges that these educators are confronted with', amongst others. For post level three educators, questions included focus also on the management of the school, such as, 'how many staff members are at the school, how would you describe your management style regarding learners and educators', amongst others.

- *My teaching and learning context*, through which educators are encouraged to develop a profile of their learners and classroom and their school and community. This section includes two questionnaires through which to construct these two profiles. In constructing the learner and classroom profile some of the questions explored are the number of learners in classes, the age profile of learners, the mother tongue language and other languages, some of the challenges emerging in the classroom context and some of the socio-economic issues with which learners are confronted. In constructing the school and community profile some questions, amongst others, explored include the grades offered at the school, the number of learners at the school, a brief description of the community that the school serves, and the status of implementing the NCS in the school. Educators are also encouraged to include a photograph, picture or drawing of their school in this section. An adaptation made in this section for post level two educators is to develop an additional departmental profile of the learning area / grade / phase department that they manage. For post level three educators an example of adaptation in this section is to note the number of educators in the school and the organisation of these educators in the different departments, amongst others.

- *Reflections on previous participation in professional development activities.* Here educators are encouraged to reflect on participation in previous professional development activities through firstly, listing a summary of all activities within which they have participated over a period of time. From this summary, they are encouraged to select some of the more significant professional development experiences that they have had and to reflect on this experience in more depth. For this activity, educators are provided with a template on which to construct a summary of previous professional development programmes, including the date, the name of the programme, the programme outcomes, a brief overview of what the educator had gained from the programme and how this has supported their work as an educator. Educators are provided with another reflective sheet on which to engage in deeper reflections on the more significant professional development experiences.

- Lastly, in this first section of the professional development portfolio, educators are encouraged to make a list of all the *expectations* that they have of the process of compiling their professional development portfolio. These initially expressed expectations are intended to provide educators with a point of reference on which to reflect as they engage within the process of compiling their professional development portfolios.

- ★ Section two in part 2 of the guidelines to compiling the professional development portfolio, focuses the educator on reflecting on various aspects of their **professional practice**.

In this section and as noted before, the various aspects of professional practice have been drawn from the performance standards in the IQMS, the roles and responsibilities of educators outlined in the key performance areas for school based educators and the roles for educators defined in the Norms and Standards for Educators. The key aspects of professional practice that is the focus of this section of the portfolio includes:

- Creating a positive learning environment;
- Knowledge of the curriculum and learning programmes in learning areas taught;
- Planning, preparation and presentation of learning activities in the learning areas taught;
- Selection, adaptation and use of teaching and learning support materials;
- Monitoring and assessing learner progress and achievement;
- Human relations in the school environment;

- Contributions to the development of the school;
- Participation in extra-curricula and co-curricula activities;
- Administration of resources and records;
- Management and development of personnel;
- Decision-making and accountability;
- Leadership, communication and servicing the School Governing Body;
- Strategic planning, financial planning and education management development.

It is in this section that the primary differences in the guidelines to compiling professional development portfolios occur for educators at the three different post levels in schools. Aspects of professional practice listed under the first eight bullet points apply to all educators and are therefore part of all three sets of guidelines for different post levels. The remaining aspects have been integrated into the guidelines for Heads of Department, Deputy Principals and Principals. Further differences are reflected in the focus on these aspects of professional practice. In the guidelines for educators at post level one the focus of reflections is primarily on classroom practice and participation in extra-curricula and co-curricula activities. For example, educators are encouraged to reflect on how they have created a positive learning environment in their classrooms. In another example, they are encouraged to reflect on learning activities recently used in the classroom context and to reflect on these learning activities and its contribution made to learning within a certain learning area, amongst others. In the guidelines for Heads of Departments, reflections are focussed also primarily on classroom practice and extra-curricula and co-curricula activities, but extends to include various reflections on processes of management within the department. For example, Heads of Department are encouraged to reflect on processes of planning within the department that they manage and on their approaches to management within these departments, amongst others. In guidelines for educators at post level three, reflections are focused on leadership and management of the school as a whole. For example, Principals and Deputy Principals are encouraged to reflect on the policies, procedures and processes through which a positive learning environment is created for all in the school context. They are similarly encouraged to reflect on processes of support that they offer to their staff as a whole and learners in the school context. Details of these differences could be reviewed in the three sets of guidelines attached as appendix E, F and G for educators at post levels 1, 2 and 3 respectively.

In this section of the guidelines, educators are offered two sets of reflection sheets and a pocket for evidence for use in reflecting on the particular aspect of their professional practice.

- The first reflection sheet, educators are encouraged to use in the first term in undertaking a self-assessment of their practice to inform the development of a professional growth plan (as part of section three in the portfolio) and future participation in professional development processes. These reflection sheets asks educators particular questions about their professional practice as a guide to reflections and are referred to as *guided reflections*. For example, relative to creating a positive environment in their classroom, educators are asked to reflect on: what factors in your classroom context reflect a 'positive learning environment' and enable effective individual and group learning? how do you think you could improve the learning environment in your classroom that enables productive individual and group learning? how are you able to assess whether all of your learners participate actively in teaching and learning activities in your classroom?
- Educators are encouraged to use the second reflection sheet in the third quarter and using a blank template reflect on these aspects of their professional practice. This activity is scheduled for the third quarter to allow educators the time to explore ways in which they could improve and enhance aspects of their professional practice identified through the first round of reflections. These processes of reflection are called *unguided reflections*.
- Relative to each aspect of professional practice, a *pocket of evidence* has been provided. This pocket of evidence has been provided to encourage educators to collate various types of evidence that support their reflections around this aspect of their professional practice. For example, in reflecting on learning activities used in the classroom, educators are encouraged to include lesson plans, examples of learners work, assessment plans and assessment records amongst others. These various pieces of evidence listed are merely suggestions as to what could be included as evidence in reflecting on this particular aspect of their professional practice. Educators are further encouraged to include other evidence as well that they draw on in their reflections.

Section two focussing on professional practice, forms the bulk of the professional development portfolio. Though as noted before, educators are encouraged to see their professional practice in relation to their teaching and learning context and their ongoing participation in professional development activities.

- ★ The third section in part 2 of the guidelines focuses on the **professional development** of educators, the implications this holds for their professional practice and visa versa. In this section, educators are encouraged to draw on their reflections undertaken in section 2 (see above) and to develop a professional growth plan. In this professional growth plan they are encouraged to note areas

in their professional practice that requires further development and to identify various sources and time frames through which these professional development needs could be addressed. Educators are then encouraged to engage proactively within professional development processes towards the planned outcomes articulated in their professional growth plan and to reflect on their achievements towards the outcomes noted here. Here educators are given a reflection sheet on which to reflect on their participation in various professional development programmes. Some of the reflective questions guiding these reflections, include for example, what were the intended outcomes of the professional development programme, what have you learnt through participation in this professional development programme and how have you been able to apply your learning in your professional practice. Educators are then also encouraged to collate a range of evidence in a pocket of evidence, relative to each professional development programme engaged with. Some suggested pieces of evidence for inclusion include, for example, the professional development programme, certificates of attendance / participation, examples of activities engaged with through the programme and examples of work completed through participation in the programme.

- ★ Section four of the guidelines makes provision for educators to engage in **processes of reviewing** the professional development portfolio. To this end, a review template is included in the guidelines for completion by various individuals undertaking the review of an educators' portfolio. This review template encourages the reviewer to focus on the evidence collated in the portfolio and to comment critically on the various sections of the portfolio.
- ★ Part 2 is finally concluded with an **evaluation** sheet through which educators are encouraged to reflect on the process of compiling their professional development portfolio. They are further encouraged to feed any critical comments on the process and the actual guidelines to the Professional Development Manager at SACE.

RECOMMENDATIONS TO SUPPORT THE COMPILATION OF THE GUIDELINES AND EDUCATORS ENGAGEMENT WITHIN THESE PROCESSES

Through the process of developing the guidelines to support the compilation of professional development portfolios and through processes of inviting comment on the initial drafts of the guidelines, various recommendations have been formulated from insight gained. Some of these relate to the compilation of the guidelines and other to processes of support for educators in compiling their professional development portfolios. These recommendations include:

★ ***Design and Layout of the guidelines***

The guidelines, because they were developed as a self-study guide, could be seen as fairly text heavy. To address this I would recommend that some attention be given to the design and layout of these guidelines so that they become user-friendly and that the heaviness of the text is somewhat marred by the insertion of graphics. Through the two parts of the guidelines, I have made some suggestion for inserting icons and graphics to break the text, marked in a blue highlight in the text of the guidelines. I would however, further recommend the commissioning of an experienced graphic artist to develop additional graphics for the guidelines that relate in some way to the text, to add a dimension of interest to what could be seen as a text overload.

I have further made a recommendation for distinguishing the three sets of guidelines from each other using a specific icon for each post level, to ensure that educators work with the guidelines appropriate to their specific post level.

I would recommend that page numbers *not* be inserted in Part 2 of the guidelines, since some of these pages include guidelines and others include the loose –leaf sheets that will be used with which to compile the portfolio. In the case of compiling the actual professional development portfolio, if page numbers were used, this would result in the portfolio pages numbers not following in sequence.

★ ***Collating the guidelines***

In the collation of the guidelines, I would recommend that Part 1, the generic and broad based set of guidelines be compiled and bound into an A5 booklet. I would further recommend that two 'eyes' be inserted at the bound side of the booklet for collation into a two ring binder.

I would recommend that Part 2, together with Part 1 as a bound A5 booklet, be collated into a two-ring bind file. This would provide educators with some of the resources necessary to compile the professional development portfolio, one of the challenges often cited by educators in the pilot project. If financial resources allow it might be worthwhile exploring the cost of the *Create a Cover* file that allows for educators to insert the cover page for their portfolio into the cover of this file. This recommended collation of the guidelines would provide then some form of uniformity in the professional development portfolios being developed by all educators in the country.

In Part 1 I have made some recommendation for the use of different coloured paper in the guidelines to distinguish the various range of forms from each other. Here I have recommended the following colours for the following sections in the guidelines.

- | | | |
|---|--|--------|
| - | Part 1 and specific guidelines for each section | cream |
| - | Interleaves around which to organise your portfolio | yellow |
| - | Blank templates, forms and questionnaires for completion | blue |
| - | Reflection sheets | green |
| - | Pockets of evidence | pink |

I would recommend that this colour code be used for the printing and collation of the guidelines file.

*** *Linking it to the IQMS***

I would recommend that the guidelines be offered as a support process within the implementation of the IQMS, which I believe will serve not only the educators in supporting their engagement with these processes, but also the evaluators in practically implementing development appraisal and performance management. The guidelines have been developed fairly closely within the proposals for operationalising the IQMS. As such it could be seen as a useful resource through which to support the implementation of the Development Appraisal and the Performance Management Programmes.

In piloting the use of the guidelines relative to these processes in the IQMS, as suggested below, the guidelines might come to strengthen the implementation of IQMS processes and could in turn be improved through insights gained in the implementation of the IQMS.

*** *Securing support for educators in compiling the professional development portfolio***

Though the guidelines have been developed as a self-study guide to compiling the professional development portfolio, it might be useful to explore some processes of support for educators in engaging with the process. Some suggestions for support could be explored in:

- The support mechanisms offered within the IQMS, for example the *Development Support Group*, as suggested in Part 1 of the guidelines;
- Drawing on educators who have participated in the pilot project to offer support to other educators in their regions / districts / circuits. Many educators participating in the pilot project have noted their willingness to support other educators in engaging in processes of compiling their professional development

portfolios. It might be useful in the further roll out of this process to engage these educators in offering support to other educators organised, possibly in district / circuit / regional clusters.

- Integrating processes of support in compiling portfolios into the key performance areas of *Curriculum Support Staff*. For example, Curriculum Support Staff visiting educators in their school context could offer support to these educators in compiling their professional development portfolios.
- Linked to the above point, integrating processes of support for compiling professional development portfolios into the *guidelines for office-based educators* in compiling their professional development portfolios.

★ ***Piloting the self-study pack of guidelines***

The compiling of professional development portfolios is likely to be a new and challenging experience for most educators, as is reflected in the evaluations of many participants involved in the pilot project. The Professional Development Portfolio project, through these guidelines is attempting to offer greater support to educators in encouraging and supporting educators to compile their professional development portfolios. It might be useful to pilot these more detailed guidelines as a self-study pack, together with some of the suggested processes of support prior to implementing them in full.

It might similarly be useful to select certain sites in the dissemination of the guidelines as a focus for observation, monitoring and evaluation of the use of the guidelines amongst educators and in the context of the IQMS as these processes roll out. It might similarly be useful to review the use of these guidelines in terms of supporting the roles and responsibilities of educators and in supporting the roles and competences intended for educators in the Norms and Standards for Educators.

It might further be useful to draw on these insights to continue to update and strengthen these initially developed guidelines

SOUTH AFRICAN COUNCIL FOR EDUCATORS

GUIDELINES FOR DEVELOPING PROFESSIONAL DEVELOPMENT PORTFOLIOS

EXPLORING EXPERIENCES AND PERSPECTIVES OF FACILITATORS IN THE PROFESSIONAL DEVELOPMENT PORTFOLIO PROJECT

Monday, 11 April 2005 – 09h30 to 16h30

- 1) What has motivated the need for the proposed portfolio guidelines? *Many evaluative comments on the workshop material are positive and few people have suggested any kind of change to these.*
- 2) What would be the primary intention for these portfolio guidelines? *Various educators focussed quite strongly on the organisation of static evidence and reflecting on past professional development – mostly certification, etc.*
- 3) What focus do you envisage for the portfolio? *Reflective practice, in which case focus would be on professional development and implications for practice, perhaps some historical overview of professional development, some participation in professional development processes, reflecting on these.*
- 4) Were educators given any stationery with which to support the process of developing portfolios? If so, how has this worked and what strengths are associated with these materials?
- 5) Has there been a review of some of the portfolios developed and what are some of the patterns and trends, challenges and strengths in these that might inform these portfolio guidelines?
- 6) What format for the portfolio have you used and how has this worked?
- 7) What processes of review has previously been built into the process of developing portfolios? Peer, self and tutor review.
- 8) How do you envisage the use of the portfolio guidelines or the process through which educators will be encouraged to use these?
- 9) Do you envisage any support to educators in developing these portfolios? What recommendations could be made in this regard? *Some accommodation could be made in the guidelines for peer support processes at schools.*
- 10) How do you envisage its links within the broader policy framework of teacher professional development, eg. DAS, NTEF – possible licensing of educators, 80 hours of professional development etc?

11) Do you envisage the use of these guidelines for educators only? What about Curriculum Support Staff?

SOME SUGGESTIONS FOR THE PORTFOLIO GUIDELINES

1) Format of portfolio guidelines

I would recommend one of two options:

a) A guidelines booklet

An A4 booklet with guidelines for compiling a portfolio. This would then take the form of a resource and is likely to serve the same purpose as the booklets previously developed. It could however also include a range of appendices that educators could copy and then include in the portfolios, for example, reflection sheets, questionnaires, etc. Such as the example of the NEEP – GET portfolio guidelines booklet and the Learning for Sustainability guidelines – see examples.

b) A loose leaf portfolio pack

Here I am thinking of a pack of A4 sheets that supports the collation of the portfolio. So it would include a range of punched and colour coded loose leaf 'forms' that educators could fill in and then collate into a file. For example, a standardised contents page with which to start the portfolio, educators would then simply complete this blank form and file it. Other examples are a blank form on which educators outline their own understandings of the portfolio and note some of the expectations that they have of the process. Some examples are included as appendices in the NEEP GET guidelines and the Learning for Sustainability guidelines – see examples.

What I thought could be included in these loose leaf sheets are some illustrated examples of what other educators have done. For example, when educators are being asked to reflect on an aspect of their practice, we could include an example of one such reflection. I have many examples of work that educators have done in the above two projects and we might also be able to draw on some of the educators portfolios involved in the PDP project before.

I favour the latter option for various reasons:

- ◆ Many educators in the evaluations note that they were unclear of where to start in the process of developing the portfolio. Some also note that they were unsure of what to include. The second option I think would provide clearer guidance on what to include and would provide something of a clearer structure for the portfolio.
- ◆ In the two projects noted above, we used the first option and found that educators needed ongoing support in compiling the portfolio, though each of them had a copy of the guidelines.
- ◆ The latter for me would be a kind of interactive set of forms with which educators interact in a systematic way to compile their portfolios.
- ◆ The contents of this pack will then be guided by the purpose of and suggested contents of the portfolio.
- ◆ Here I am thinking of using various coloured paper to denote various activities, to include some pockets within which educators could collate other documents such

as learning support materials used, learners' work, papers with which they interacted etc.

- ◆ So in essence the latter is the blank portfolio, to be completed by educators.

2) Focus of the portfolio

Ultimately, I feel that in fostering reflective practice, the portfolio should focus on the educators' personal and professional development and practice within the specific teaching and learning context. Given this focus, I would suggest three focus areas for the portfolio.

These three sections are suggested purely to facilitate the organisation of the portfolio and are not necessarily suggested as three separate dimensions within which the teacher engages, but rather as interacting dimensions of the teaching and learning process facilitated by the teacher. These focus areas then define the contents of the portfolio.

a) An outline of the teaching and learning context

In the NEEP – GET project, we found that this section helped educators to better understand themselves, their vision and practice and remain conscious of the teaching and learning context and the learners with whom they worked. This could include for example, the educators cv, statement of their teaching philosophy, an overview of the school and community context, the classroom context etc. –see details below. Educators previously involved in the PDP project similarly note the usefulness of the portfolio is helping them to 'see' more clearly where they have come from and where they have gone in their career.

This section similarly becomes useful to the reader / assessor / reviewer / evaluator / etc. in outlining clearly the teaching and learning context of the teacher and supports an understanding of some of the challenges with which educators are confronted.

This section also links quite closely with the suggested content of the portfolio in the PDP project and I think a useful section to retain.

b) The educators' classroom practice

This section I would suggest focussing centrally on the educators' classroom practice that involves the design, implementation and reflection on lesson plans appropriate within their learning area, grade, phase, learners etc.

This section could be linked to outcomes developed and linked to the roles and competences defined in the Norms and Standards for Educators – not sure of this right now, consider in a bit more depth.

Examples of content here could be more than one lesson plan, minimum two that reflects some form of development from one to the other, examples of resources used, examples of learners' work, assessment plans etc.

c) Professional development processes

This section could involve educators' design of a professional development plan, both short term and longer term and reflecting on the implications of this professional

development for their practice. I think educators need to be encouraged to do something in the short term, if not participation in a programme then some form of self-study. Otherwise time could become an ongoing excuse for not doing anything.

3) Contents of the portfolio guidelines

These will be defined by the focus areas above, and could include, for example:

a) Section 1 – Teaching and learning context

- ✓ A photograph of the teacher.
- ✓ Curriculum Vitae – the development of this could be enabled by the inclusion of a standardised form on which to include the detail – so this is an example of the loose leaf appendices that make up the portfolio pack.
- ✓ A short biography of the teacher that could be developed using a questionnaire to develop a profile of the teacher, including for example, some of the teaching methods and processes used, some of their goals and visions for themselves and learners, etc. A questionnaire could be included as one of the loose leaf appendices.
- ✓ A profile of the classroom context, outlining for example, the number of learners, their ages, language of instruction, mother tongue, overview of socio-economic background, some of the main issues with which learners are confronted. In the NEEP - GET we have found that this was a useful exercise through which educators became more conscious of the learners and some of the issues that shaped their interactions in the classroom context.
- ✓ A school and community profile, its development enabled through questionnaires;
- ✓ Reflections on the teaching and learning context.
- ✓ Reflections on participation in past professional development processes, the strengths developed through these, gaps that require further attention and the implications of past professional development for practice.
- ✓ Some expectations that educators have of this process of portfolio development.

b) Section 2 – Teaching practice

This would include documentation that shows what the teacher has done in terms of designing and using lesson plans. It could also include some forms that support and enable reflections on the design and use of lesson plans. See the NEEP – GET examples.

Here I suggest the inclusion of two lesson plans, one possibly developed and used in the second quarter and another early on in the fourth quarter of the year – see my suggestion for timing the development of the portfolio below.

c) Section 3 - Professional development

This could include, for example:

- ✓ A personal and professional development plan (short and longer term) developed in the first term of the year.
- ✓ An outline of steps towards achieving stated outcomes.
- ✓ Progress towards achieving these outcomes.
- ✓ The implications of achieving / not achieving these outcomes for practice – how this is reflected in the second lesson plan.
- ✓ What next?

The compilation of this evidence could be supported by various pockets and guidelines for selecting and reflecting evidence of participation in these programmes. For example, a template for the growth plan, pockets for including the programme, examples of work done, etc. and sheets for reflecting on outcomes of participation.

4) Timing the development of the portfolio through guidelines

I would recommend building into the portfolio guidelines a time frame for compiling this portfolio. I thought that a good time frame might be one year through which various sections and activities towards compiling the portfolio could be done. For example, section 1 and the development plan for section 3 could be done in the first quarter. Section two could be done in the second quarter, professional development and the lesson plan could be done in the second half of the year. I have not thought in much detail about the practicalities of this, but think it might be worthwhile considering in terms of educators struggles in finding time to compile portfolios, reflected in the evaluations.

5) Guidelines for supporting the development of the portfolio

I think it might be worthwhile considering some forms of guidelines that support the development of the portfolio. Some initial ideas that I have here are to build in some guidelines on peer review within the school context at interim periods (eg, quarterly) during the year of compiling the portfolios. Again, these are initial ideas and we probably need to consider the practicalities in more depth.

6) Supporting professional development and practice

I think a useful addition to the guidelines might be providing educators with some resources to support their self-exploration of aspects within which they are seeking more development, for example, national assessment documents, national policies on the use of teaching and learning support materials, lesson plan templates used, etc.

7) General comments

Appendix B: Attendance list for educators' workshop

Appendix C: Interactive discussions with sample of participating educators in PDP pilot project

SOUTH AFRICAN COUNCIL FOR EDUCATORS

GUIDELINES FOR DEVELOPING PROFESSIONAL DEVELOPMENT
PORTFOLIOS

EXPLORING EXPERIENCES AND PERSPECTIVES OF TEACHERS PARTICIPATING IN THE
PROFESSIONAL DEVELOPMENT PORTFOLIO PROJECT

- 1) What do you understand by the 'professional development portfolio'?
- 2) What would you describe as the purpose of the professional development portfolio?
- 3) From your understanding of the professional development portfolio and the purpose of developing one, what do you think should be included in the portfolio (contents)?

Purpose	Contents

- 4) What are some of the main challenges / difficulties with which you were confronted in developing the portfolio during the Professional Development Portfolio project?
- 5) How do you think that some of these challenges could be overcome through the development of professional development portfolio guidelines?
- 6) What do you understand by the term 'reflection' and what is the purpose of reflection?

Reflective activity 1

Consider a lesson that you taught recently in your classroom.

Part 1: In the space provided for below, reflect critically on this lesson.

Part 2: complete the following four leaf clover, using the leading statements in each of the leaves.

[INSERT REFLECTIVE CLOVER]

Part 3: Answer the following questions about your lesson.

- a) Which lesson did you teach?
- b) In which learning area was this lesson taught?
- c) How does this lesson relate to the curriculum requirements for this learning area, phase and / or grade?
- d) Describe one of the activities in your lesson.
- e) How did this lesson work for both you and your learners?
- f) What are some of the challenges that you experienced with this lesson?
- g) What could you do differently in this lesson next time, to overcome some of the difficulties and challenges that you experienced?

Reflective activity 2

Answer the following questions.

- 1) How did you feel doing the first reflective activity?
- 2) Which of the three parts did you prefer doing? Why?

- 3) Were you able to learn anything about your teaching from this activity? If so, what have you learnt?
- 4) Do you think these activities might be useful in supporting you to reflect on your practice? Why?
- 5) Would similar activities be useful in developing your professional development portfolio? Why do you think so?

Proposals for the portfolio guidelines

1) Format of the portfolio guidelines

Two options:

- a) **An A4 booklet** with the guidelines on how to compile the portfolio and what to include. This would then take the form of a resource and is likely to serve the same purpose as the booklets previously developed. It could however also include a range of appendices that teachers could copy and then include in the portfolios, for example, reflection sheets, questionnaires, etc.
- b) **A loose leaf portfolio pack**, with various forms to be completed, pockets for documents, questionnaires, etc. This would include a range of punched and colour coded loose leaf 'forms' that teachers could fill in and then collate into a file. For example, a standardised contents page with which to start the portfolio, teachers would then simply complete this blank form and file it. Other examples are a blank form on which teachers outline their own understandings of the portfolio and note some of the expectations that they have of the process.

What could be included in these loose leaf sheets are some illustrated examples of what other teachers have done. For example, when teachers are being asked to reflect on an aspect of their practice, we could include an example of one such reflection.

2) The focus and contents of the portfolio

Three sections, with clear guidelines to compile these sections:

a) Section 1 – profile of the teacher, learners, school and community

- ✓ A photograph of the teacher.
- ✓ Curriculum Vitae

- ✓ A short biography of the teacher including for example, some of the teaching methods and processes used, some of their goals and visions for themselves and learners, etc. To support the development of this profile we could include a questionnaire as one of the loose leaf appendices.
- ✓ A profile of the classroom context, outlining for example, the number of learners, their ages, language of instruction, mother tongue, over view of socio-economic background, some of the main issues with which learners are confronted.
- ✓ A school and community profile;
- ✓ Reflections on the teaching and learning context.
- ✓ Reflections on participation in past professional development processes, the strengths developed through these, gaps that require further attention and the implications of past professional development for practice.
- ✓ Some expectations that teachers have of this process of portfolio development.

b) Section 2 – classroom practice, developing and using lesson plans

- ✓ Lesson plans developed and used
- ✓ Teaching and learning support materials used
- ✓ Assessment plans and records
- ✓ Learners' work
- ✓ Some reflections on all of the above.

c) Section 3 – professional development

- ✓ Professional development plan (short and long term)
- ✓ Steps towards achieving stated goals
- ✓ Progress towards achieving goals
- ✓ How this progress has shaped practice
- ✓ Future plans

3) Timing the development of the portfolio

I would recommend building into the portfolio guidelines a time frame for compiling this portfolio. I thought that a good time frame might be one year through which various sections and activities towards compiling the portfolio could be done.

4) Supporting the development of the portfolio

How could processes of peer review of portfolios work in the school context at interim periods, for example, quarterly?

- 5) What do you need in terms of guidelines for supporting the development of a professional development portfolio?