

Leading Sustainable Change In an Education System: Student Portfolios in British Columbia

**Australian Association for Research in Education
Conference December 2008
Changing Climates: Education for Sustainable Futures**

NEA 08785

*By three methods we may learn wisdom:
first, by reflection, which is noblest;
second, by imitation, which is easiest;
third by experience, which is bitterest.*
Confucius (551 – 479 BCE)

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Background

A portfolio is a thoughtfully organized collection of evidence that demonstrates one's knowledge, skills and competencies. As part of the changing educational and career climate in Canada, some professions require practitioners to develop and maintain a working portfolio as part of their professional growth and career path. Many college and university faculties also require student portfolios. The portfolio initiative for secondary school students has been called "the most innovative educational strategy in two hundred years"¹ because development of a unique portfolio encourages students to adopt an active and reflective role in their own learning and development.

In September of 2004, British Columbia's Ministry of Education added a mandatory portfolio to its secondary school graduation program requirements. Since Canada's education system is governed provincially, the new requirements applied to only approximately 170,000 secondary school students (Grades 10 – 12) in the province of British Columbia. The "Graduation Portfolio Assessment,"² intended to encourage the characteristics of a well-rounded citizen, was in effect for only two years. Despite staunch support from many educators and community members, ongoing controversy resulted in the requirement being rescinded before even one full cohort had graduated.

Methodology

This paper explores some principles of change management and how they could apply to widespread education reform, using the case of Graduation Portfolio Assessment implementation in British Columbia secondary schools. Through the lens of the author's participatory action research, this paper unpacks the B.C. experience and responds to the question: How might a significant change to education practice be implemented in a sustainable way?

As the ministry representative with primary responsibility for provincial implementation of the portfolio initiative, the author travelled throughout British Columbia for three years, observing, collecting information, conducting workshops, participating in portfolio events, working with teachers, developing publications, delivering presentations and addressing more than 3,000 educators, parents, students and community members. In reflecting on this experience, she applies principles from the fields of education, leadership, organizational change, communication and change management.

Implementation Challenges

Once they understood the pedagogical foundation for the portfolio requirement, most B.C. educators embraced the concept of a student portfolio, believing that this initiative would ultimately benefit students. Implementation, however, was inconsistent across the province. Because portfolio development is individualized, students were offered a vast

¹ B.C. School District 36, Director of Instruction (interview)

² See Appendix for background information

Mary-Anne Neal, M.Ed.

Leading Sustainable Change in an Education System

amount of choice and flexibility. Thus, teachers faced many challenges, including but not limited to:

- verifying the authenticity of the evidence
- assessing evidence in a consistent manner
- determining roles and responsibilities
- scheduling time for portfolio coaching and assessment
- coordinating the final presentations

It was a steep learning curve for teacher practitioners, who felt unprepared for this different form of assessment. Many principals and senior school district management also lacked an understanding of the purpose and pedagogy behind the portfolio requirement.

The B.C. Ministry of Education tasked school districts with determining portfolio implementation plans that would meet the unique needs of their students and learning communities. To support school district efforts, the ministry committed one full-time staff member for two years, developed web sites, hosted a webcast and distributed print publications³ for teachers, parents and students. At fifteen regional events, ministry staff facilitated full-day sessions where teachers and administrators from the surrounding school districts discussed challenges, shared ideas, raised issues and designed strategies. About 1,200 teachers, counselors, principals and district staff participated in the events and came on board with the concept. Why were these strategies inadequate to successfully lead B.C.'s 20,000 secondary school educators to create sustainable change in their learning communities?

Lacking a clear vision of success, a strong network of portfolio champions early in the plan or an explicit understanding of the concept, many educators throughout the province refused to embrace a profound change to their pedagogical practice. These teachers felt overwhelmed by the new policies, discouraged by the lack of funding, bewildered by the language, confused by the apparently arbitrary standards set by the ministry and resentful of yet another demand on their time and energy.

Parents and students, anxious about the new graduation requirement, turned to teachers for answers. Teachers who felt confident in their abilities and supported by their school districts responded with enthusiasm. The majority of practitioners were less knowledgeable about the portfolio concept; they merely shrugged, in the belief that the initiative would not last. Ultimately, the Minister of Education bowed to pressure from constituents and made the portfolio optional.

Change Management

The B.C. portfolio experience is a case study in change management for educators who plan to introduce a measure of reform to professional practice. Lessons learned can be applied to other education initiatives and situations where sustained, widespread change to practice is the desired outcome. The foundation of any education system is a complex

³ www.bced.gov.bc.ca/graduation/portfolio/resources.htm

Mary-Anne Neal, M.Ed.

Leading Sustainable Change in an Education System

blend of people, relationships, procedures and traditions. To change that system requires a process that takes people outside their comfort zones into uncharted waters. Even minor changes in education practice can interrupt routines, challenge assumptions and, at least initially, create more work.

Teachers are the primary change agents in an education system. Thus, all sustainable education reform depends heavily on teacher buy-in, support and commitment. They are the ones who make or break any change in their learning communities, by choosing to see the new challenge as a problem or as a possibility. As change agents, teachers are the most important leaders of education initiatives. Students, parents and community members look to them for direction and guidance.

Because teachers are highly visible, they must be dedicated to the success of the initiative and willing to take a stand in public. They also need to be less visible when appropriate, turning the spotlight over to others when the time is right. Finally, they must be equally comfortable working collaboratively with students, administrators, district and school board officials, senior staff, parents, community members, business owners, government policy-makers, fellow teachers and support staff.

Not many people will immediately buy into a major change to their professional practice, and some will accept change more slowly than others. Therefore, early adopters are important role models in convincing others of the benefits and empowering colleagues to reach their potential. This takes energy and trust on both parts. The lead teacher's personal integrity, ability to foster strong working relationships and communication skills are critical factors for success.

If teachers are the foundation which supports the initiative, what are the building blocks? We can look to the leadership literature for some ways to implement transformative change in an education system. In *The Leadership Challenge*, Kouzes and Posner identify five actions that are key for success⁴:

Model the way

Modeling means going first and living the behaviors you want others to adopt. People are often compelled to believe what they see leaders consistently doing. Teachers who develop their own portfolios are models for the behaviour they expect from their students. Similarly, students with successful portfolios are models for their peers.

Inspire a shared vision

People become highly motivated when a goal captures their imagination and they can fully believe in the promise for the future. A vision for portfolio might be *Celebrating Your Achievements*, with accompanying visuals that embody the spirit of the movement. Whatever the vision, communicate it clearly and consistently so that others understand the goal and embrace it with equal passion.

⁴ Kouzes and Posner, Jossey Bass, 2002

Challenge the process

Active critics are a great asset in any undertaking. Students, teachers and parents who resist the concept of a portfolio can contribute to a healthy debate and, ultimately, a positive outcome, by identifying implementation barriers so that they can be met and overcome. We can learn from adversity and difficult situations. Ask tough questions, listen carefully, and be prepared to act on ideas that have merit.

Enable others to act

Talk is not enough. School staff must feel empowered, with the ability to put their ideas into action. Professional development for in-service teachers and teachers-in-training will build the confidence and competence required for successful implementation of new education initiatives such as a portfolio. Tap into the collective intelligence of your learning communities.

Encourage the heart

People are at their best when they are passionate about what they are doing. The most effective education leaders unleash the emotions and enthusiasm of others. Consider appealing to the affective domain through portfolio presentations that demonstrate the successes of students who might otherwise fall through the cracks.

Steps for Implementing Change

What might the change process look like in the setting of an educational jurisdiction? Thoughtful reflection on the B.C. case study reveals some fundamental principles that will support successful implementation of a portfolio initiative or, indeed, any substantive change to instructional practice in an education setting:

1. Assess the existing level of agreement

To what extent do the education partners agree with the concept? The original B.C. consultation process involved thousands of people, most of whom agreed with the concept of a student-led portfolio. However, following the initial consultation, there was no widespread consensus on the details of the initiative and little further discussion with school districts about possible implementation strategies.

2. Communicate

Any education innovation must be widely understood by all partner groups if it is to be fully embraced. A comprehensive communication plan, including a public relations campaign, is necessary to educate parents, students, researchers, academics and community members. Marketing strategies should include all forms of media as well as earned and paid publicity. Informal communication is at least as powerful as formal methods, so consider developing social networking tools, web sites, chat rooms and online educator forums, where stakeholders engage in vigorous, unmonitored dialogue.

3. Provide professional development

An education initiative that differs markedly from previous models must be phased in over a few years so that teachers can adapt their teaching techniques. Assessing portfolio evidence against new provincial standards is a departure from traditional methodology

and requires training. Therefore, faculties of education at universities must also incorporate the new information and pedagogy into their curricula. Post-secondary institutions can contribute to the research by following the pilot studies, interviewing practitioners, publishing their findings and encouraging a lively academic discourse.

4. Identify district champions

Champions in every school district can motivate and coach educators, students, parents and community members. As role models for the initiative and mentors for the classroom teachers, these people become the primary liaison with the government, community groups, academics, parents and fellow teachers. Through a network of champions, momentum for the movement transfers from schools to homes and communities, where a portfolio culture then becomes rooted in everyday routines.

5. Display models

Ambiguity is ubiquitous in change initiatives, and can be overcome with clarity of purpose and vision. This is accomplished by showing rather than telling, through models that allow people to judge for themselves the merits of portfolio development. During the pilot phase, students will develop authentic evidence for their portfolios. Sharing these electronic and hard copy samples with educators and other students creates positive energy and widespread enthusiasm for incorporating the portfolio into standard practice.

6. Demonstrate benefits

Sound reasons for embarking on something different must be communicated consistently to all stakeholders, especially students and teachers. A clear vision of success, depicted in visual displays and widely communicated, is a constant reminder that the portfolio is one way in which we all support student success. The final portfolio presentation is an ideal time to showcase student achievements to a wide audience and demonstrate the value of collecting and presenting evidence of their unique achievements in a portfolio.

7. Celebrate success

Ceremonies and rituals are visual indications of real progress. If people do not believe that they are succeeding, their efforts will flag. Observing student success reinforces a high level of commitment to the vision. When we see students demonstrate their new-found knowledge, understandings and competencies, we are reminded of our overall shared goal – i.e., making a positive difference in students' lives. Portfolio presentations in B.C. schools were a source of great pride and joy for students, parents, teachers, community members and school district staff.

Factors to Consider

Is the time allotted for implementation reasonable? Account for the pilot phase, teacher training, development and distribution of resources and execution of a comprehensive communication plan.

Mary-Anne Neal, M.Ed.

Leading Sustainable Change in an Education System

Does the project team have sufficient resources to successfully complete the initiative? More important than time and budget are the people who contribute to our learning communities. Analyze their competencies and address their needs.

How deep is the commitment to change? From top management to grass roots, all stakeholders must firmly believe in the portfolio vision so they will contribute to its fulfillment. Consider all perspectives respectfully.

How much effort is required? A new initiative invariably asks more of teachers, students, parents and administrative staff over and above the usual workload. What can realistically be added to their existing responsibilities?

How do we proceed? The route may not be obvious, but with a clear vision and ongoing collaboration, the direction will be there. Finding the way forward is an ongoing process of course correction. Expect detours along the way.

Who will lead the initiative? Educators who are inspired to embrace an initiative will, in turn, inspire their learning community. Convey whole-hearted commitment to all stakeholders, and they will often respond in kind.

Closing Thoughts

Leading, managing and sustaining meaningful change in an education system is a challenge worth facing, if we are to continually improve student achievement. At the heart of transformational leadership is the vision, a view of the future that excites the education partners and converts them into believers. That vision flourishes and grows in an environment where people feel safe voicing their opinions and feelings. The key is enabling a process where all stakeholders are personally motivated to overcome the challenges that are sure to arise. This means developing a strategic plan that acknowledges the factors identified in this paper, as well as other challenges specific to the educational jurisdictions contemplating significant change.

To undertake implementation of an education initiative is not for the faint of heart. Champions are subjected to a high level of scrutiny and judgment from their education partners. It takes energy, stamina and a bold heart to stand in front of teachers and encourage them to change their professional practice. This personal approach is necessary to touch their hearts because, ultimately, each teacher's goals and values shape the experiences of his/her students.

Encouraging students to develop a portfolio of their achievements is but one way to engage their interest, nurture their talents and celebrate their strengths. When we value the personal growth and development of our students, when we nurture their hopes and dreams, when we sustain their spirit and encourage their hearts ... then we enhance their learning, regardless of the vehicle and methodology. In the words of a senior

Mary-Anne Neal, M.Ed.

Leading Sustainable Change in an Education System

administrator who attended a recent portfolio presentation, “These young people have remarkable talents. Our future is in good hands.”⁵

The great aim of education is not knowledge but action.

Herbert Spencer, English philosopher (1820 - 1903)

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⁵ B.C. School District 36, Assistant Superintendent (interview)

APPENDIX

Why Graduation Portfolio Assessment?

There were two motivating factors for revising British Columbia's secondary school graduation requirements to include a portfolio component. The first was a rapidly changing economy. Each year, about 55,000 students graduate from B.C. high schools, roughly 79 per cent of those who entered Grade 9 four years prior. This completion rate is typical across North America. In the past, students who did not graduate could still find well-paying work in B.C.'s resource industries. A dramatic change to the economy in recent years means that most jobs now require at least a high school diploma.⁶

The second factor was a province-wide survey of recent high school graduates which indicated that they did not feel adequately prepared for work or post-secondary education. Based on this information, the B.C. Ministry of Education launched a massive, province-wide, year-long consultation with thousands of students, parents, community members, educators, business organizations and academic institutions. The purpose was to develop a graduation program that would support students in becoming well-rounded, confident and successful in their transition from high school to independence. In order to capture the human and social aspects of their development, students on the new program were required to create a unique portfolio of their learning and life experiences.

In their portfolios, students collected evidence of their learning and experience in six distinct areas: Arts and Design; Community Involvement and Responsibility; Education and Career Planning; Employability Skills; Information Technology; and Personal Health. Creating a portfolio was intended to encourage students to develop the attributes of the ideal B.C. graduate – one who is a self-directed, lifelong learner, a critical thinker, an effective communicator, a socially responsible citizen, and a healthy individual.⁷

What was the B.C. Portfolio?

The portfolio was both a product (i.e., a collection of evidence) and a process (i.e., ongoing reflection on individual growth and competencies). In their portfolios, students captured and celebrated their non-traditional achievements. It was a way to recognize each student's achievements and reward initiative, commitment and community building. Student portfolios included such diverse accomplishments as: writing an original play, refereeing soccer games, participating in community events, sewing a costume, designing a web site, volunteering at a soup kitchen, teaching Sunday school or organizing a dance. Some possibilities were identified in a guide produced by the B.C. Ministry of Education.⁸ In practice, portfolio content was limited only by a student's imagination.

Introducing Graduation Portfolio Assessment

Grade 10 students were introduced to the concept of the graduation portfolio in a mandatory four-credit course called Planning 10. Under the teacher's guidance, students began collecting evidence for their portfolios from class work, extra-curricular activities,

⁶ Conference Board of Canada, 2001

⁷ BC Ministry of Education *Graduation Program* brochure, 2004

⁸ www.bced.gov.bc.ca/graduation/portfolio/resources.htm

Mary-Anne Neal, M.Ed.

Leading Sustainable Change in an Education System

the home or the community. They continued to work on their portfolios through Grade 11, accumulating marks based on standards set by the Ministry of Education. Portfolios were kept in various formats, such as videotapes, binders, scrapbooks, CDs, and websites. In Grade 12, students selected their most prized evidence to showcase in a presentation held during the final months of their secondary schooling.

Assessing the Graduation Portfolio

Evidence in a student's portfolio was assessed by a teacher according to specific criteria set by the Ministry of Education. For example, student participation in a play might meet a Core requirement for Arts and Design. The teacher checked the evidence against the stated criteria and assigned marks. The total number of marks accumulated by the end of Grade 12 was the final percentage earned by the student for his/her portfolio.

Though teachers were responsible for assessing portfolios and assigning marks, peer assessment and self-assessment were also part of the ongoing portfolio process. Over three years, students continually revisited their work, replacing earlier samples with more current pieces. Renewing and editing the portfolio was part of the learning process. As students identified new goals and replaced earlier samples with more mature work, they demonstrated their growth and development.

Presenting the Graduation Portfolio

In a final culminating activity, students were asked to consider their experience, select their most prized evidence and present it to a panel. The panel could be composed of teachers, community members, parents and/or peers. The nature of the presentation and level of formality differed from school to school. Some formats were: a "Portfolio Fair" (similar to a Science Fair or Career Fair), an interview, a multi-media approach, a group performance, a panel presentation, a cultural tradition (e.g., a First Nations Circle). The presentation was a powerful way for students to showcase their work, identify their competencies and be recognized for their achievements.

Final Reflections

In British Columbia, the Graduation Portfolio was intended to be an alternative form of assessment for learning as well as a celebration of individual strengths and competencies. It was also meant to be a developmental process that took place over three years. Instead, the portfolio requirement was rescinded before a full cycle was completed, and approximately 50,000 students did not complete their portfolios as originally anticipated.

Though the portfolio is no longer mandatory for high school graduation in British Columbia, many B.C. secondary school teachers continue to encourage their students to collect, reflect on and present evidence of their accomplishments in a unique portfolio that will continue to evolve in the years to come. The addition of a portfolio as a form of authentic assessment is now entrenched in various locations at the grass roots level, rather than consistently throughout the province's sixty school districts. Particularly in the Kootenay region of British Columbia, a portfolio culture has taken root in the schools, homes and communities.