Video Visits: An Innovation for Learning about Portfolios

by Pam Perfumo

Portfolios have captured the limelight in the recent wave of assessment reform as a new tool to cure the ills of assessing student work. To better characterize and understand the nature and purposes of this new tool, the National Center for the Study of Writing and Literacy sponsored a research project on portfolios, calling for a closer look at the settings and the professionals who use them. Working with Bob Calfee at Stanford University, I conducted a national survey and held a working conference on portfolio use. (For a report on survey results, see Calfee & Perfumo, 1993; Calfee & Perfumo 1995).

Despite the rich array of information available from the surveys and the conference, the picture remained incomplete. We still lacked the dimensional information which would bring the picture to life — the details and the context in which these portfolio projects existed. To gather this information, we needed an opportunity to talk with or observe targeted faculty groups as they grappled with portfolios. Site visits would have been ideal, but with the shoestring budget and a limited time frame, they were not a possibility.

Thankfully, necessity was the mother of invention; we developed an approach to studying classroom practice we termed “video visits,” wherein specific sites were asked to videotape a discussion session around their use of portfolios that could be mailed back to us for viewing and analysis. This article will describe our sojourn into this new approach to collecting data, casting light on specific information about portfolio use while considering the possibilities and potential of video visits as an additional source of research information.

The Quest

We knew the data we had was limited. Despite our efforts at creating an open-ended framework for survey responses, survey respondents mostly answered only the questions offered; little expansion or additional information was included. We hoped to expand the boundaries of the responses, opening a path for more direct communication, one that would permit some scaffolding but would still lend itself to being shaped by the participants. Additionally, as we considered the discussions we had observed at the working conference, we saw the value of collegial talk in helping participants to reflect on their own processes. Discussion and reflection may better get at teacher decision-making, organizational choices and professional thinking.

Specifically, by collecting video excerpts of staff meetings and presentations around portfolio assessment, we hoped to flesh out our data in the following ways:

- To collect more in-depth information. (It was likely that time and space constraints limited the detail respondents could provide on the surveys.)

- To elicit different information. (Teachers and administrators may have things to say about portfolio practice apart from the questions posed on the survey.)

- To record the interactional context of portfolio projects. (Connections and collaborations may have been difficult to represent on paper.)

- To capture the environmental context of portfolio projects. (Seeing how materials were organized
and used in classrooms could clear up misunderstandings or misrepresentations in the survey data.)

"Image," Process, and Design
We began to design our video visit concept by imagining what an “ideal” video visit might look like. What would it include, and how would the information be conveyed? And how would the visit be different from just videotaping a classroom? We determined that reflection and selection would be two very important features. Unlike a typical classroom observation, we wanted teachers to prepare a collection of artifacts ahead of time that would illustrate their portfolio process. Teachers would outline the key features of the portfolio program and then carefully select items to show how those features worked.

Ideally, the information would be presented as a retrospective. It could be similar to an interview, but on home territory with the participants structuring the presentation, determining what was important to highlight, what was working, and where the challenges lay. In the natural settings of the school and the classroom, teachers would walk us about, showing and telling us about their portfolio program with the items they had prepared.

And unlike our other data sources, participants would have the opportunity to reflect and respond to one another candidly as the presentation unfolded. Unique classroom approaches could be considered against school-wide or district-wide plans, and genuine discussions around choices, differences and perspectives would clarify concepts that helped shape the program.

We decided to prepare participants by making a sample video which would include specific information about the forms a video visit could take. Further, we would include authentic video visit footage of a real portfolio project while modeling presentation options.

We sent a letter inviting 24 programs to participate in our study. Criteria for selection included such things as a history of one or more years of portfolio use, a minimum of three teachers at the site involved in using portfolios, and district-level interest or investment in the portfolio project. The letter briefly described what would be entailed in creating a video visit and explained its role in our research.

While waiting for responses, we formulated our plan to prepare the sites to create their own videos. We reduced the entire production to seven steps. The list of suggested topics and themes included some of the topics and questions that appeared in the survey — all demonstrated in the model video — which we intended to serve as a springboard for other ideas.

Preparation of the model video was perhaps our most important task. This “training video” had to be engaging and specific, and to energize the participants to create their own video.

We offered participants three models to view, suggesting they try the option most comfortable for them. These included (1) a “show and tell” episode, which involved one teacher in her own class, showing portfolio artifacts as she discussed her use of them, (2) an “interview” episode, which involved one person interviewing two or three teachers from the same school to learn about their program, and (3) a “panel discussion” episode, which involved several teachers from different schools in the same district discussing their use of portfolios.

To create an authentic model, we conducted an actual video visit with a group of local teachers from the Redwood City School District. When we had the group of teachers together, we carefully discussed the three types of video visits we hoped to model and determined who would participate in the different segments. We laid out the questions ahead of time for review, and the room was arranged to provide a comfortable setting for conversation that could be thoroughly mocked to assure good sound quality. Once the teachers understood our plan, we began to film the different episodes. We didn’t ask them to rehearse, relying on their spontaneity (and later editing) to convey the message.

We edited the results of this video visit for use in the final training video. It began with a brief introduction by Calfee, discussing the purpose of our research and our hope for new data from video visits. Next, we introduced the three suggested styles of video visits, with a sample video excerpt illustrating each style. Finally, we suggested production tips, including advice for preparing the participants with a review of questions, setting up a comfortable seating arrangement, and using adequate microphones and lighting to assure clear picture and sound.

Because the teachers were discussing real processes, purposes, and issues around their use of portfolios, the actual video visit segments used in the training
video were both authentic and lively. With tight editing, our finished training video ran just over 30 minutes, offering the viewers clear guidelines for creating a video visit while informing them of an actual district portfolio project in the San Francisco area.

Results and Discussion
We asked participating sites to return a finished video to us in four months. With follow-up calls to encourage completion of the project, we received nine video visits. Of the original 24 nominated sites, seven declined participation, five did not respond, and three agreed to participate but later were unable to complete a video due to unforeseen problems.

Of the nine video visits we received, four sites included completed evaluation forms along with their videos, and two sites sent along copies of artifacts discussed in their videos. Four sites sent videos that had been created for other purposes, such as dissemination of program information or for parent education, which also covered some of the questions we asked about in our discussion list.

As we analyzed the materials we looked for: (1) the building blocks of the program, (2) the issues identified by program participants, and (3) judgments and attitudes about what is happening in practice or what might or should be happening. These dimensions were tied to our goals for further investigation.

The chart on page 22 shows the range of programs represented, from the single class project to the large district-wide program, from small rural schools to big urban districts.

The video visits did, indeed, contribute new information to our questions about portfolio assessment, even though what we collected may better be described as a collection of case studies rather than a generalizable data set. First, there was some disparity between the information we gleaned from surveys and what we learned from video visits. For example, Program #4 reported a unified purpose for the portfolio in the survey, stating they were developed to “show growth and development over time.” However, the video discussion revealed that different teachers saw different purposes for the portfolio, and ranked their importance differently from class to class. In the video, different teachers identify parent conferencing, improving student self-esteem, aiding curriculum development, and transferring the responsibility of learning to students as primary portfolio purposes.

The tapes revealed disparities not only in purpose but in process. For instance, the survey information presented by the curriculum director of Program #6 described the process of creating and using portfolios as uniform across the school. However, as teachers on the video compared selection processes and varying degrees of student reflection, we learned that some teachers took considerable control over selecting work to be put in the portfolio, while the survey reported this was a student-controlled process. In a candid exchange, it was apparent that the curriculum director did not know about, or intend, this disparity. She pointed to the importance of more staff sharing sessions, such as was required for this video visit, in order to coordinate across classrooms.

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Talking on the videos, teachers treated issues related to the time demands of portfolio assessment differently than they did when responding to the surveys. Six of the nine surveys raised concerns about the time involved in using portfolios. Respondents reported that the extra time it takes to create and use portfolios is problematic, even though they see many benefits from the process. The survey from Program #2 reported that extra release time for teachers to work on portfolios was an issue of contention in recent contract negotiations. The survey from Program #6 said teachers put in “a lot of their own time” to see that the portfolio project was successful. And the Program #8 survey listed “Time!” as the main problem or snag they faced in their portfolio project.

On the other hand, the video visits contributed by these programs painted a more positive picture of the time demands of portfolio assessment. In the video from Program #2, teachers said that they “used their time differently” rather than framing the issue negatively. Video participants from Program #6 did acknowledge increased time demands, but they stressed that the benefits of portfolio as-
<table>
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<tr>
<th>Site</th>
<th>Video Type*</th>
<th>Format</th>
<th>Participants</th>
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<th>Comments</th>
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| #1   | For project | large group | 20 faculty from middle school and high school     | - Enhance student writing  
- Students responsible for own learning  
- Help teachers and district assess instruction | Collection and evaluation uniform across district  
Student reflection is highly valued                                                      |
| #2   | For project | 6 small panels | 14 faculty from same primary school               | - Help w/ conferencing  
- Develop self-evaluation skills  
- Collect information across years | Grass roots initiation by teachers seen as critical  
Student reflection and ownership highly valued                                              |
| #3   | Other purpose | Voice-over description | Students and teachers from same primary school | - Help students to monitor and reflect on learning  
- Help students set learning goals  
- To inform parents | Students use their portfolio collection to lead parent conference  
Collection and evaluation uniform across school                                           |
| #4   | For project | Panel        | 8 faculty from same district                      | Purposes varied school to school, but included  
- Develop reflection skills  
- To show growth  
- To inform parents | Voluntary pilot study encouraged innovation  
Uniform evaluation by rubrics across district                                               |
| #5   | For project | 1 interview and 1 panel | 5 faculty from same district                      | - To show growth  
- To provide alternative assessment information | Pilot project encouraged innovation, so little uniformity present  
Student reflection valued by all programs                                                  |
| #6   | For project | 1 interview and 2 panels | 4 faculty from same district                      | Purposes varied school to school, but included  
- Develop reflection skills  
- To show growth  
- To inform parents | Processes used varied to reflect different purposes                                        |
| #7   | Other purpose | Interview | 1 teacher and interviewer                        | - Used to hold project work “in progress”  
- Create a “history” of a project from first draft to final. | School embraced “portfolio culture,” but some differences in process exist across grade levels |
| #8   | Other purpose | Voice-over description | Students and teachers from same elem. school    | - Accountability  
- Instructional improvement | Emphasized need for site agreement about what is valued, and why  
- Just collecting work isn’t enough—must be judged against standards                      |
| #9   | Other purpose | Interview | 1 teacher and interviewer                        | - To document teacher judgments about student achievement | Spoke only for own class—no information about school or district efforts  
Teacher chooses contents to justify grades                                                  |

* video type indicates if a video was made as a video visit particularly for our project or was created for another purpose and then submitted to our study.
essment largely outweighed what extra time might be needed to manage portfolios. And these teachers spoke of their high motivation to devise creative solutions to time demands to accommodate further development of portfolio programs. The video from Program #8 was an informational video created for another purpose, and it included no mention of teacher burnout or overload.

Secondly, there was a difference in the type of information available when participants were asked to report about practice in a written form as compared to a group orally discussing their program. For instance, the role of collaboration and staff communication was presented differently in the two mediums. In surveys, the importance of collaboration and discussion among teachers was often stressed, leading to the impression that adequate opportunities were provided for this purpose. From their survey, Program #1 “places a high value on the personal and professional development that has resulted from the collaboration required to use portfolios.” Program #2 reported that “the power of portfolios lies in helping teachers focus on the teaching/learning process together.” The survey from Program #4 said, “reviewing our curriculum and identifying what we valued has been the foremost benefit of our portfolio pilot.” Program #5 stated that “this project has brought on a new level of collaboration between us that we’ve never had before.” And Program #6, still in the developmental stages of their project, wrote, “Communication and sharing between teachers is what keeps our project alive and evolving all the time.”

However, when viewing the videos, several projects mentioned this was a “first” or “rare” opportunity to talk together about their portfolio practice. Perhaps previous collaboration had been confined to grade level peers or other small groups, but as teachers talked about their work for the video, it was apparent that many were learning of the details of their colleagues’ work at the school-wide or district-wide level for the first time. In their video, Program #1 brought together middle school and high school teachers to discuss their program. When talking about collection and evaluation procedures, middle school teachers were corrected twice by high school teachers who noted that things were done a bit differently at their level, apparently new information for the middle school group.

Programs #2, 4, 5, and 6 also set up panels with teachers from different grade levels or schools, and in spontaneous discussions they had many questions to ask one another around issues, procedures, and priorities. The teachers from Program #2 didn’t realize their definition of portfolio varied between classes, with some including standardized tests and others not. Teachers from Program #5 asked one another specific questions, and the video began with a kindergarten teacher telling a fifth grade teacher from the same school how happy she was that they would have a chance to learn about one another’s portfolio programs. Teachers from Program #6 did a comparative presentation, showing artifacts from different grade levels to compare programs, and they would frequently comment, “What a good idea,” or “I didn’t know that,” as though they were sharing information for the first time. In fact, the evaluations we received on the process of making a video visit reflected the high value teachers put on the time to talk and listen to one another when making the video. This different perspective served to validate the importance of staff collaboration that had been indicated in the surveys, but broadened the definition to include the need for collaboration among a broader community of professionals.

Another type of information found in the video data but not clear from survey data concerned problem-solving processes. For example, in the video from Program #4, a teacher asked for ideas to extend the use of the portfolio beyond the individual classroom. The district curriculum coordinator suggested a plan to begin cumulative portfolios that would follow the child through their entire academic career. This spurred a discussion among the teachers concerning the problems with making assumptions about a student based on past performance. It was determined that the group would look at other models of cumulative portfolios before moving ahead, and one teacher volunteered to do so.

The information captured on the videos also served to reinforce certain points in the survey data. Program #1 used the survey to list features that were valued in student work. In the video, teachers also spent considerable time discussing what they valued in student work and how that helped determine what their curriculum needed to accomplish. And a common theme found throughout the survey and video data concerned the increased ownership and pride students felt for their work once they became involved with portfolios.
For example, Program #3 identified improving student ownership of work as a major purpose for their portfolio project. And in the informational video they submitted, excerpts of students talking with their parents about the pride they have in their work is highlighted. Program #8 commented on the improved motivation and ownership students showed in their writing when discussing the benefits of their program. The video also highlighted this feature by showing vignettes of students planning and collaborating on reports without teacher guidance.

Implications for Teaching
From a practical point of view, the video visit information, combined with the survey results, reveals interesting information that can prove helpful to classroom teacher and other educators planning a portfolio program. First, we learned the importance of the purposes of a portfolio program. In many ways, the purpose(s) define and determine portfolio processes, including what is collected, how it is collected, and how or if it is evaluated. For example, if the purpose of a portfolio program is to involve students in evaluating their own progress, the student is likely to have more control over the selection of work to appear in the portfolio, and student writing and reflection about their work will be highly valued. If the purpose is identified as more instructional, with a goal to better monitor the progress of student writing, it is likely the teacher will have more involvement in the selection of pieces that demonstrate a student’s typical and best work, and the portfolio is more likely to include all drafts and conference notes that reflect the writing and editing processes the student used. It becomes apparent that taking the time to build a consensus about the specific purpose of a portfolio program is an important first step for any school or district to consider.

Secondly, regardless of purpose, results continually pointed to the fact that portfolio use produces a strong sense of teacher engagement, empowerment, and renewal — and this despite an increased commitment of time and energy. The fact that portfolios are an effective vehicle to validate teacher judgment is likely to contribute to this investment. Unlike more traditional forms of assessment, actual classroom performance, which reflects teacher choice about curriculum and assignments, comes into the forefront in portfolio programs. Indeed, instructional practices can be evaluated as easily as student work when portfolio collections reflect a “history of instruction.” Teacher collaboration is also moved to the forefront when teachers work together to blaze new trails, adding professional support and interaction to some who otherwise operate in isolated classrooms.

Beyond teacher validation, the structures of some portfolios provide direct instructional information, helping a teacher see where students’ strengths and weaknesses lie and what instruction they will benefit from next. The fact that portfolios can show so clearly that different students are ready for different things has, in many cases, motivated teachers to restructure their teaching strategies to provide more time for project work, freeing themselves from the front of the classroom to offer individual or small group instruction.

Finally, most of the portfolios we studied were dramatically lacking in technical foundations (specified standards, developmental rubrics, benchmarks, etc.) to help the assessment value of the portfolio move beyond the individual classroom. Some teachers have voiced a real reluctance to impose standards on portfolio collections for fear they will compromise the integrity of this highly personal form of assessment. Others have acknowledged their lack of expertise in the area, and wait for the “assessment experts” to offer suggestions or solutions. And a few have taken the step to grapple with these hard questions together. Teachers have come together and hashed out what they really value in student work, and what they expect from the children they teach at different ages and stages.

Implications for Further Research
Since these comparisons were drawn on programs who reported on their portfolio use with both a completed survey and a video visit, the new and different information found in the video visits suggests this method of data collection can add a new dimension of understanding to descriptive studies. The videos ultimately served to illuminate certain points raised in the surveys and challenge others. We accomplished much that we had set out to do, but on reflection, there are some changes we would make in our methodology.

For example, one thing we did not learn as much about as we had hoped was the environmental context in which portfolios are used. Our sample video modeled a teacher walking us through her class with a “show-and-tell” of the artifacts she and her students...
used, but none of our video participants chose this format as an option. While several brought student samples to show in group discussions, we didn’t get a look inside the actual classrooms. Rather, most visits were filmed in conversational groupings, typically in a staff lounge area or non-descript setting that didn’t show classroom configurations or organization.

In looking back, it is likely our model video was biased towards the more formal format, since only a brief segment (approximately five minutes) showed a class “walk-about” while the rest of the tape portrayed conversational groupings (more than 15 minutes). Also, the discussion questions we sent along as prompts focused on purposes and structures of portfolios rather than classroom organization and routines around portfolio use. This points to the careful planning that must go into a model video or “video visit kit” when using this methodology for data collection. Clearly, our modeling helped to shape our results, and imposed some limits that we did not intend.

We would also provide more time and support for programs to complete the project. We obtained a participation rate of 27%, but if we only count the videos we received that were specifically created for our study the rate drops significantly. Telephone invitations and discussions may have proved more effective to explain the process and to encourage participation. Planning for a second round of recruitment that could share results from the first round of participants could also contribute to a better participation rate.

Apart from the critique of our methodology, there are limitations to this approach of data collection for research. Perhaps most important to acknowledge is that it does not represent a random sample. The rigors and commitment involved for a participant to agree to produce a video visit automatically limits the data pool to only those participants very favorably inclined towards the project or process under study. It is unlikely a program who experienced a failure or many complications with a portfolio project would agree to produce a video visit about their experience; this is certainly a “public display” of a program’s competence, and the investigator is more likely to find a “best foot forward” in this medium. This may, in part, explain some of the disparity between the survey and video data. As mentioned previously, video discussions placed issues such as time demands and problems with burnout in a more favorable light than was presented in written reports.

Despite the above mentioned limitations, the concept of a “video visit” may prove useful beyond the borders of research. With staff development time at a premium, it could be a useful communication tool. The reality of teachers and students working on actual programs could enthrone workshops and prove very useful for the induction of new teaching staff. A video visit could be framed with a mentor teacher and a novice to address teacher training needs, or new programs and approaches could be conveyed to parents and community members. It could even prove to be a valuable evaluation tool for examining classroom practice.

And, even with their limitations, we did learn something more about portfolio practice when the video visits became sources of data. Looking through a different lens brought new issues to the forefront and cast others in a different light. Simply moving beyond a typical rating survey to a more open-ended “webbing” style in our written surveys opened new avenues for participant response. Adding an interactive video provided more options for discussion and reflection. Considering other alternatives as well, such as technology links or post-analysis interviews, may serve our science well in advancing our understandings of complex educational issues.

References


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