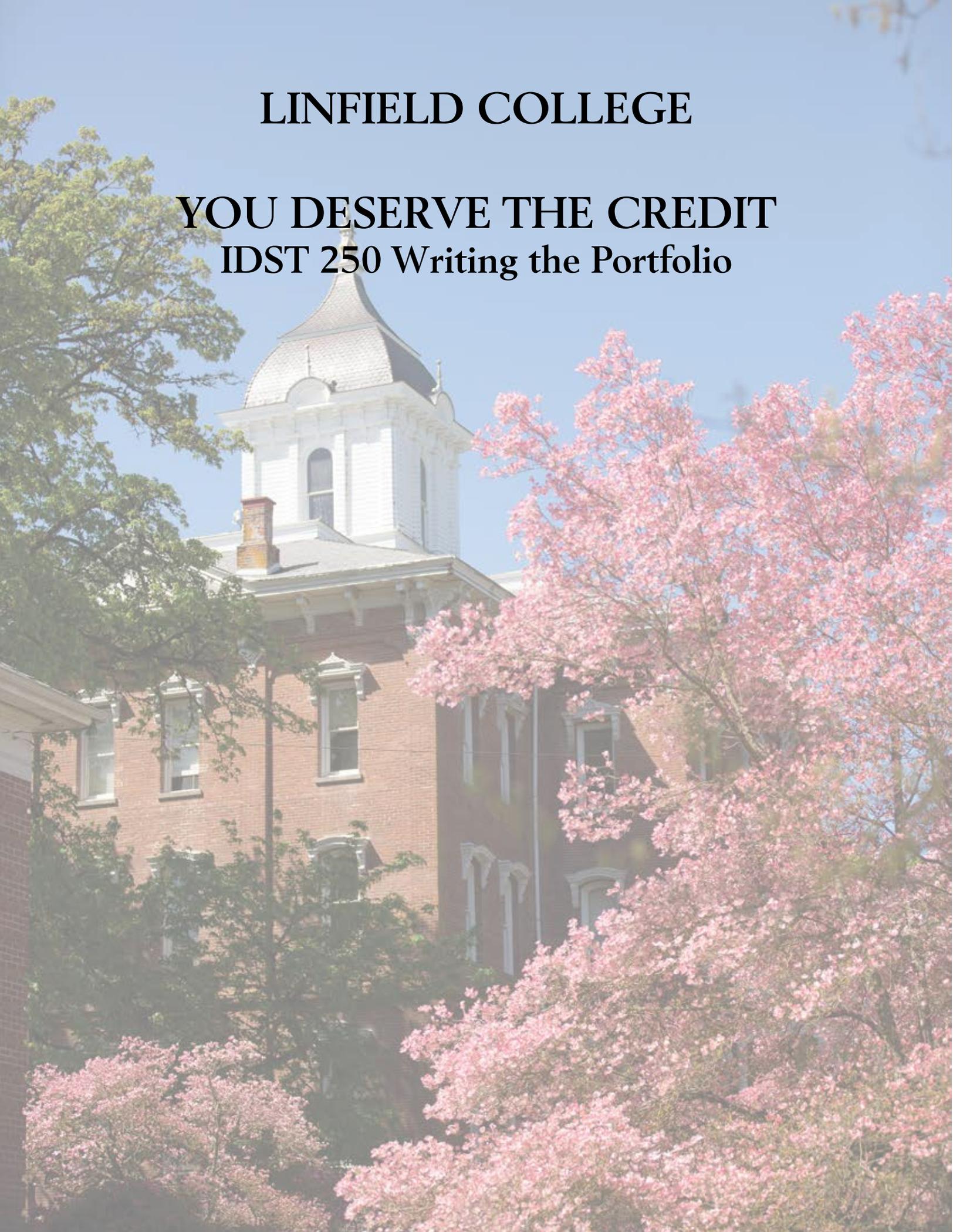


LINFIELD COLLEGE

YOU DESERVE THE CREDIT
IDST 250 Writing the Portfolio



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SECTION A: CPL OVERVIEW

LIVING IS LEARNING

Unlike the young person who graduated from high school and spent the next four years earning a bachelor's degree in preparation for a career, you chose a different path.

You went to work after high school or you enrolled in college and decided to drop out after a year or two. But you kept on learning. You learned skills on the job or in the service. You learned about history and cultures through travel. You learned about organizations and decision-making and dealing with people on the job or through community service. You developed other skills by maintaining a home and raising a family. A surprising amount of all that you have learned as an adult in life is comparable to what a college student will learn attending classes.

WHAT IS PRIOR LEARNING?

Prior Learning is retrievable and currently applicable knowledge that you have acquired from your home, community, and work experiences. Linfield believes that you deserve college credit for this learning. The purpose of this guide and the course in Credit for Prior Learning is to help you retrieve and demonstrate the current applicability of what you have learned since high school and convert it into college credit. Whereas college students earn credits in the classroom for learning knowledge and skills they will apply in the future, you will request college credits for currently applicable college-level knowledge and skills that you have already learned.

Three Ways to Earn Degree Credits

There are three ways to earn the 125 semester credits required to obtain your Bachelor's degree: taking Linfield courses, transferring credit from other colleges, and documenting prior learning.

Linfield Courses

At least thirty semester credits must be earned by taking Linfield courses, and 20 of your last 30 must be from Linfield.

Transfer Credit

Generally, Linfield will grant full credit for courses you have completed with a grade of C or better at a regionally accredited four-year institution. Linfield will accept up to 72 semester hours of credit for courses taken at a regionally accredited two-year college (with a grade of C or better) if the courses are considered to be similar to the types of courses already offered at Linfield or traditionally accepted by the college.

Credit For Prior Learning

Prior Learning is learning you have acquired in your adult years since high school but for which you have not received transferable college credit. Linfield offers three ways to receive credit for your prior learning: CLEP Tests, ACE/PONSI, and Portfolio.

CLEP Tests

You can use standardized examinations developed by national testing organizations such as the College Board. The most widely used examinations are the CLEP (College Level Examination Program) Exams, which are recognized by Linfield and most other colleges. If you read well, have low test anxiety, and generally consider yourself to be a "good test taker," you may wish to consider CLEP exams. Information may be found at: www.collegeboard.com/clep. Submit a list of CLEP tests you plan to take for pre-approval. The tests must be taken by the end of your first year in the Linfield program. You may earn a maximum of 30 credits from CLEP tests.

ACE

Students admitted to an Online and Continuing Education Program, other than RN to BSN, earn credit from specific training offered through the military or from business and industry, if such training has been reviewed by the American Council on Education (ACE) and received a credit recommendation. Linfield generally accepts the ACE recommendations for credit that is consistent with a liberal arts undergraduate education, but all ACE transcripts are reviewed by the faculty. Evaluation fees apply.

Portfolio

You may receive up to 31 semester hours of credit for your portfolio. In your portfolio you will identify specific college courses and discuss what you have learned, how you have learned it, and the evidence you have to support your discussion. The completed portfolio will provide Linfield with the means to evaluate and award college credit for your learning. Your portfolio will be unique (no portfolio is exactly like any other), but it should contain at least four basic elements:

- Learning Autobiography
- Educational Plan
- Course Challenges
- Documentation of Learning

When you have completed your portfolio, it will be reviewed by Linfield faculty. The faculty will recommend the number of credits you should be awarded for each course requested. The credits earned by portfolio will be added to your official transcript after you have completed six hours of course work from Linfield. The IDST 250 course, a prerequisite to be taken before you develop your portfolio and submit it for evaluation, counts as three of those six required Linfield semester hours. INQS 126, the prerequisite to IDST 250, is also 3 credits.

Section A. Facts and Figures

Figure 1: Why Write a Portfolio?

At this point you may be asking yourself why you should bother to write a portfolio. Why not just take the necessary courses and be done with it?

First, you deserve the credit. The portfolio represents significant accomplishments in your life, and the credit earned will shorten the length of time it takes to earn your degree.

During the 13-14 weeks of a typical semester, in a 3-credit course you will spend 45 hours in class or online and 100 hours reading, studying, and preparing assignments. Multiply this by the 31 hours of maximum portfolio credits (about 10 such courses).

Total = 1450 Hours! (clock hours)

After you have learned how to prepare the first few course challenges, you can usually finish subsequent challenges in 15-25 hours. If you challenge all 31 semester hours,

Save = 1250 Hours! (clock hours)

You save time that you would have spent in class listening to information that you have already acquired through experience.

Second, although students who have completed portfolios will tell you that the process can be bewildering and frustrating in the same breath they will tell you that it is well worth the effort in the additional self-esteem you will develop as a learning, self-improving individual.

As the bewilderment disappears, you will become increasingly sustained by your knowledge of the depth and worth of your experiences and by the savings in time and money over enrolling in the same courses for which you already deserve the credit.

Fees

Tuition:

You will pay tuition for IDST 250 Writing the Portfolio. These three credits apply toward the 30 semester credits required in Linfield coursework. If you do not submit your portfolio within two years of completion of IDST 250, you will be required to repeat it as an auditor and pay the audit fee.

Submission Fee:

You will submit two course challenges prepared during the IDST 250 class. When you complete your portfolio and submit it to Linfield for review, you will pay a fee based on the number of credits you request:

Mini-Portfolio (1-3 credits)	\$ 75
15 or fewer semester hours	\$325
16-25 semester hours	\$425
26 or more semester hours	\$525

You are guaranteed this fee if you submit your portfolio within two years of the date of completion of IDST 250.

Evaluation Fee:

This fee is paid after the faculty has reviewed your portfolio and made a determination of the number of credits awarded. You may want to confer with your advisor to determine which credits you wish to have added to your transcript.

After the review of your portfolio, you will receive a Transcript Report listing credits awarded. You need to return the Transcript Report indicating which credits you want placed on your transcript and a check for \$50 per semester credit.

Deadlines

Your portfolio must be submitted within two years of taking IDST 250. In other words, if you take IDST 250 Writing the Portfolio in the Spring of 2017, you must submit the portfolio by the Spring of 2019. This time limit protects you from changes in policy and curriculum.

If you have not submitted the portfolio within the two-year period, we ask that you register for IDST 250 again as an auditor.

To allow the faculty ample time to evaluate your portfolio, and to allow you time to take additional coursework if necessary, the deadline submit your portfolio is the previous September 1.

SECTION B PREPARATION OF THE PORTFOLIO

College-Level Learning

Your portfolio can be accomplished in 2 phases and 13 steps. Though preparation of your portfolio will progress more smoothly if you take these steps in logical sequence, portfolio writing is not a precise, lock-step operation like the assembling of a watch or your car's transmission. You may find yourself working on one part of your portfolio and then another; you may need to go back to the first part again for some minor adjustments or revisions before your portfolio is ready to be submitted.

Before you begin, it is important to understand the nature of college-level learning. Three primary characteristics of college-level learning are that it:

- can be articulated through written and oral communication
- includes theoretical understanding
- has general applicability

You need to describe precisely what you know and can do, along with the appropriate attitudes you have developed as a result of your experiences. You should also be able to demonstrate to an expert that you possess all of the learning you have claimed.

The learning should include both a theoretical and practical understanding of a subject area. Even though you may not have applied the knowledge you possess in a practical situation, you should be aware of how it might be applied. If you have learned how to do something, you should understand why you are able to do what you do. You should not expect to receive college credit or recognition for the mere application of a manual skill or a narrowly prescribed routine or procedure. You should be able to show how the particular knowledge you have acquired fits into the larger

picture or reflects a broader principle. For example, can you show how the financial decisions that your family makes reflect familial values and priorities? Or can you discuss how your bank's lending policies reflect broad economic trends? In college, students are constantly asked to explain the theories that they have learned. Students must be able to give specific examples of such theories to illustrate them. In some respects, you are being asked to do the opposite-- to recognize your specific experiences as manifestations of broader, more abstract principles and phenomena.

Your learning should have general applicability outside of the specific situation in which it was acquired. For example, you may have worked your way into a company position which involved preparing job descriptions, interviewing prospective employees, and making decisions about whom to hire. If you also learned principles and techniques that you would be able to apply in a similar position in another company and could describe those principles adequately in writing, then you could probably use that knowledge to seek college credit.

You might receive credit for knowledge that you acquired many years ago, if you can demonstrate that what you learned then continues to be applied now. However, if your learning has become obsolete (if factories, for instance, no longer use the production techniques you learned) you must be prepared to demonstrate that you have updated your knowledge before you can expect to receive any credit.

Sometimes, learning is personally invaluable yet may not meet the criteria for college level learning. Careful analysis of your learning under the guidance of your instructor may be helpful in determining which areas of your learning may be equivalent to college-level courses. Sometimes fellow students are able to provide insight as well.

PHASE I. EDUCATIONAL PLANNING AND LEARNING AUTOBIOGRAPHY

You begin the portfolio process with a review of your current transcript and transfer evaluation to assess the role of prior learning credit in your degree program. You will write a Learning Autobiography which is not only a required part of the finished portfolio but is also useful in identifying strengths and weaknesses in your writing.

Step 1. Read this guide

You should read this Guide before you begin Step 2. First, scan the entire contents; then, reread those sections that seem unclear. Thoroughly familiarizing yourself with the contents of the guide will reduce any initial confusion you may experience. It may also accelerate your completion of the portfolio process by preventing you from wasting time.

It is imperative that you apply and be admitted to Linfield because your transfer evaluation is a significant part of your educational plan. You must submit your application

along with the fee, then have your official transcripts sent to Linfield as soon as possible. Only after receiving your transcripts can Linfield process your application.

If you have taken college coursework since receiving an official evaluation, have an official transcript sent to Linfield. You will receive an updated Linfield transcript.

Mail all official transcripts to:

Linfield College OCE

900 SE Baker St

McMinnville, OR 97128

Generally, your advisor can help you keep your transcript evaluation updated and help you determine if you are eligible for CLEP or ACE credit.

Step 2: Significant Learning Experiences Since High School

What have you learned in life that is worthy of college credit? You can begin to answer this question by recalling your significant learning experiences since high school. These are events in your life that contributed significantly to your social, spiritual, or intellectual growth.

Here are some common categories:

Work: any activity for which you were paid, including military service.

Volunteer experiences: nonpaying internships or apprenticeships, community aid, community activities, political activities, church activities, service organizations, nonpaying elective offices held, volunteer work in social service agencies, time contributed to supervising youth organizations.

Noncredit courses and seminars: in-service training, workshops, clinics, conferences, noncredit discussion groups, evening courses, lecture series, television or radio courses, non-credit correspondence courses.

Travel: study tours, significant vacations and business trips, living for extended times in various parts of the country or abroad, participating as a worker or volunteer in an American subculture.

Recreational activities and hobbies: performing in a musical group, acting or working in a community theater, playing sports, participating in artistic endeavors, writing fiction and nonfiction, speaking in public, pursuing nature interests, attending plays and concerts, visiting art museums.

Computer skills.

Independent reading, viewing, and listening: any reading you've done which is not directly related to courses you have taken for credit. Include books, magazines, newspapers, and significant articles you've read and Internet research. Particularly note any subject areas in which you have done intensive reading but for which you have not received college credit. Radio programs you've listened to as well as television programs, plays, or movies you've seen may also be relevant.

Conversations with experts: significant conversations you've had with experts in fields related to the subjects described in items above which are not related to college credit courses or activities.

Using the Form 1 in Section C, complete your own learning list. A sample can be found in Section D.

In the process of identifying significant learning experiences, you may refer to your current résumé. However, you may also discover that your résumé lacks some of the depth of your learning experience list, since your résumé only includes relatively recent employment. Therefore, at this stage, we suggest that you prepare a more complete résumé listing your work experience, education, community service,

hobbies, etc. Include anything that appears to be relevant to your significant learning experiences. Feel free to use any résumé format you find clear and attractive. As with other parts of the portfolio, you will probably revise this résumé several times before you submit your completed portfolio for evaluation.

Step 3: Organize Learning Experiences into Learning Areas/Disciplines

Remember, the primary purpose of your portfolio is to “translate” into college credit all of your learning experiences (at home, at work, and in the community) that represent college-level learning. Because your portfolio will be reviewed on a department-by-department basis, try to organize your learning experiences into learning areas that correspond with the departments (subject areas) of the college.

Begin by referring to your Significant Learning List. Remember that universities are organized by colleges, and that colleges are divided into departments. Linfield College, for example, has 21 departments. Each department emphasizes a particular branch of knowledge: art, biology, chemistry, communications, economics and business, and so forth. Each “learning area” of your portfolio should correspond to one of these areas of emphasis.

For example, Mary Stiles is a mother of three school-aged children. She is active in community affairs and has a number of hobbies. Her list of significant learning experiences (her learning list) includes bowling, managing family finances, volunteering at her children's school, serving the community, establishing wholesome relationships among family members, and providing nutritious meals for her family. She finds that these experiences relate most closely to courses taught in Health, Human Performance and Athletics (HHPA), Sociology (SOAN), and Education (EDUC). Descriptions of what she learned working on a political campaign, directing a fund drive for a local charity, and serving as a Girl Scout leader also fit into these learning areas.

Bob Adams runs a food processing business, serves on the school board, has read extensively about the Civil War and has many other interests. Bob has learned his business through self-study, conversations with experts, and participation in food processing and business management conferences. He clusters this learning into a subject area labeled “Management.” Two terms on the school board (one as chairman), plus a number of other leadership positions in the community, have given him considerable knowledge which he describes in another area titled “Community Service.” Bob's Civil War studies and the genealogy he developed to identify ancestors who fought on both sides of that war comprise another learning area which he titles “History.”

Both Mary and Bob include requests in their portfolio for “Paracurricular Credit.” Such credits are awarded for personal skills such as tennis, playing softball or golf, backpacking, skiing and playing a musical instrument or singing in a choir.

A maximum of 8 paracurricular credits (no more than 4 in one department) will count toward graduation. Linfield's paracurricular courses are denoted by numbers below 100, such as HHPA 071 Yoga or HHPA 099 Backpacking.

Step 4: Develop Preliminary Educational Plan

Your Educational Plan states where you have been academically, where you want to go, and how you plan to get there. You and your advisor must develop an Academic Plan before you can begin your Educational Plan.

The plan is divided into four sections:

Section 1:

With the assistance of your portfolio instructor, you begin your plan with the writing of your Educational Goal. Your educational goal may be as brief as: to earn a college degree. It may be more detailed if you wish to explain that you plan to use your degree as a credential for a new career, as preparation for graduate study, or to accomplish some other objective.

Section 2:

The second part of your Educational Plan – Courses for Which I have Already Received Credit – recounts learning you have already acquired, including transfer credits already earned from an accredited institution other than Linfield, from CLEP tests, from ACE evaluations, and from Linfield courses already completed. Your official evaluation that was done when you were admitted will give you some of this information. Your unofficial Linfield transcript will tell you what credits you have received since being admitted.

Section 3:

The third part of the Plan – Classes I Still Need to Take – outlines a proposal for future courses: credits to be earned from coursework at Linfield and other institutions to complete your degree. You will need to discuss this part with your advisor to determine which curriculum and major requirements are still not met and how many elective credits you must take to meet Linfield's graduation requirements.

Remember that you must earn at least 30 semester credits of your total 125 through coursework offered by Linfield in Linfield classes. These courses must be taken in Linfield classes and do not include any credits earned through the portfolio process.

Section 4:

The final part of the plan is, Courses I am Requesting in My Portfolio. With the assistance of your instructor you will develop a preliminary list of courses that you plan to challenge. In the early stages this will be an estimate that most likely will change as you complete this course. A blank Educational Plan Form can be found on page.... in Section C. You can view a sample Educational Plan on page.... in Section D. In order to get an accurate count of credits completed, you may want to order an updated Linfield transcript.

Step 5: Write a Preliminary Draft of the Learning Autobiography

A learning autobiography discusses the major learning experiences of your life since high school, particularly those pertinent to the credit requests included in your portfolio. The preliminary draft of your autobiography and the list of significant learning experiences (organized into learning areas) are designed to help you recall your learning experiences and then organize them into a coherent list or outline. Taken together, the autobiography and list of learning experiences will serve as an "information bank" which you can draw upon to identify and develop the course challenges that will comprise the body of your portfolio.

The final draft of your autobiography will be placed near the front of your portfolio to introduce you to the evaluators. It will enable them to understand the interrelationships between your past experiences and the learning you have acquired. Although credit will not be awarded based on the learning autobiography itself, the contents often support and clarify requests for credit. relationship between earlier experiences and college-level learning.

Here are some guidelines for writing your autobiography:

Focus on significant learning experiences--those that influenced career, lifestyle, or family decisions--and the learning you acquired because of such experiences; omit personal details that have little to do with your learning. Remember to answer these five basic questions: Who (besides you) were the major participants? What happened? When did it happen? Where did it happen? How did it happen?

Focus on the areas of learning for which you may be requesting college credit. Someone considering credit in the social sciences will probably write in more detail about relevant family experiences than one who is requesting credit for business experience.

Include reasons for the major transitions in your life, particularly if these explanations will give reviewers a more complete perspective on your experiences.

Mention titles and content of books, magazines, and internet sites if they have had significant impact on your learning. You may include a bibliography listing these sources. For correct bibliographic style procedures, refer to Easy Writer by Andrea Lundsford.

Experiences prior to high school graduation are not generally applicable.

Write in the first person (I/me/my), emphasize the positive, and maintain a professional tone, avoiding slang, clichés, sarcasm, and inappropriate humor. Remember to provide evidence for your opinions but avoid sweeping, unsupported generalizations for which you lack direct evidence. Be assertive about articulating your own strengths and accomplishments. The portfolio is one place where it is appropriate to "toot your own horn."

Aim for approximately 5-10 pages. Although the amount of detail included is a personal decision, it is important that you include only significant events and what you learned

from them. These are the events that most likely provided the learning for which you will request credit. In addition to facts about your learning, you may wish to include your own insights as to what influenced your personal growth.

Use college-level standards of grammar, vocabulary and punctuation. Portfolio evaluators will notice carelessness in these areas. Since your autobiography (and most of the rest of your portfolio) will go through a number of drafts, you must use a computer. Spelling and grammar-checking programs can simplify your task. Another option is to recruit a spouse, colleague, or fellow student with good writing skills to serve as your editor.

A well-written sample autobiography by a successful graduate of the program can be found in Section D. It focuses on a number of learning experiences that could be fruitful for identifying courses to challenge in the portfolio. As you read this sample, note the use of transitions to indicate new learning experiences as well as this student's attention to who, what, where, and when.

Step 6: Review

The final step of Phase One is for your instructor to review your writing skills, your learning autobiography and your educational plan and to make sure that you are ready to move on to the next phase.

To pass IDST 250, you will demonstrate to your portfolio instructor that you understand how to write a portfolio. The requirements include completion of a final draft of your educational plan (with learning matched to specific courses), a final draft of your autobiography, and completion of two course challenges.

Please keep in mind that you can add additional course challenges after you successfully complete IDST 250 and the two required course challenges.

You have begun to identify your prior learning experiences and cluster them into learning areas that correspond to the departments or programs on a college campus. Now you can also begin to determine which offerings are appropriate for you to “challenge.” To “challenge” a course is to say, “What I have learned through experience and self-study is generally equivalent to what a person would learn by taking this course on campus.” You describe what you have learned in relation to the subject matter of the course, and you describe how you have learned it. Linfield faculty then judge from your descriptions and other documentation whether or not the extent of your learning meets the standards generally expected of students enrolled in the course. If the discussion and documentation of your learning meet the standards established for the course, the portfolio reviewers will award you an appropriate number of credits.

It is important, therefore, that you find out all you can about the course before you decide to challenge it. Begin with the Linfield Course Catalog. Read the descriptions of those courses which, by their titles, seem to relate most closely to your prior learning in that area.

In order to ensure that you don’t challenge inappropriate courses, you should submit your educational plan to your advisor for review as soon as possible. This step is particularly important for majors in non-business areas who may feel they could challenge an upper division business course.

We are aware that you may want to revise your initial educational plan as you move further into the process. If you decide later to include a course not listed in your educational plan, consult your portfolio instructor or advisor.

Use the following guidelines in searching for appropriate courses to challenge:

Students may not include BNMG 310 Organizational Behavior and Management in the portfolio if they plan to register for courses requiring it as a prerequisite before credit is granted. Capstone courses such as BNSS 495 Strategic Management and COMP 400 Applied Software Development Project are not appropriate for the portfolio. Also, the Computer Science department only allows students to challenge the OCE courses (in the shaded gray area in the catalogue), not the McMinnville campus courses.

Upper division courses, courses heavy in theory rather than application, and courses in the departments of

psychology, history, math, education, or any science are not recommended as potential challenges.

Look for courses that represent your most recent learning. Frequently, individuals acquire knowledge and learning early in life that is subsequently forgotten. In order to expect credit you need to be able to demonstrate current competency. For example, if you were fluent in French 15 years ago, but no longer can demonstrate competency at a college level, you may not request French in your portfolio. An exception may be made if you have created a “learning product” such as a painting, book or photograph. These products may be used as a basis for a credit request, even if you could not replicate them today.

Look for both lower and upper division courses. Linfield does not require you to have a distribution of courses at any particular level; course level is not as important as your prior learning in relation to that course. Note that many upper division courses have prerequisites. If you can, think about challenging both the prerequisite and the course you have in mind, but you will generally not receive credit for an upper division course if you have not met the prerequisites.

Obtain a current course syllabus. Syllabi generally provide a listing of course objectives, discussion topics, and required texts. The course objectives listed on the syllabus are statements of the competencies that a student who has completed the course should be able to demonstrate. Analyze them to determine if you have achieved most of the course objectives, i.e., if you are competent in all or most of the required areas. You may obtain a text and learn more about the objectives with which you are unfamiliar.

In summary, we suggest that you follow these priorities when searching for course challenges and their descriptions:

- Linfield courses that represent your most recent learning (highest priority)
- Linfield courses that represent learning you are now using.

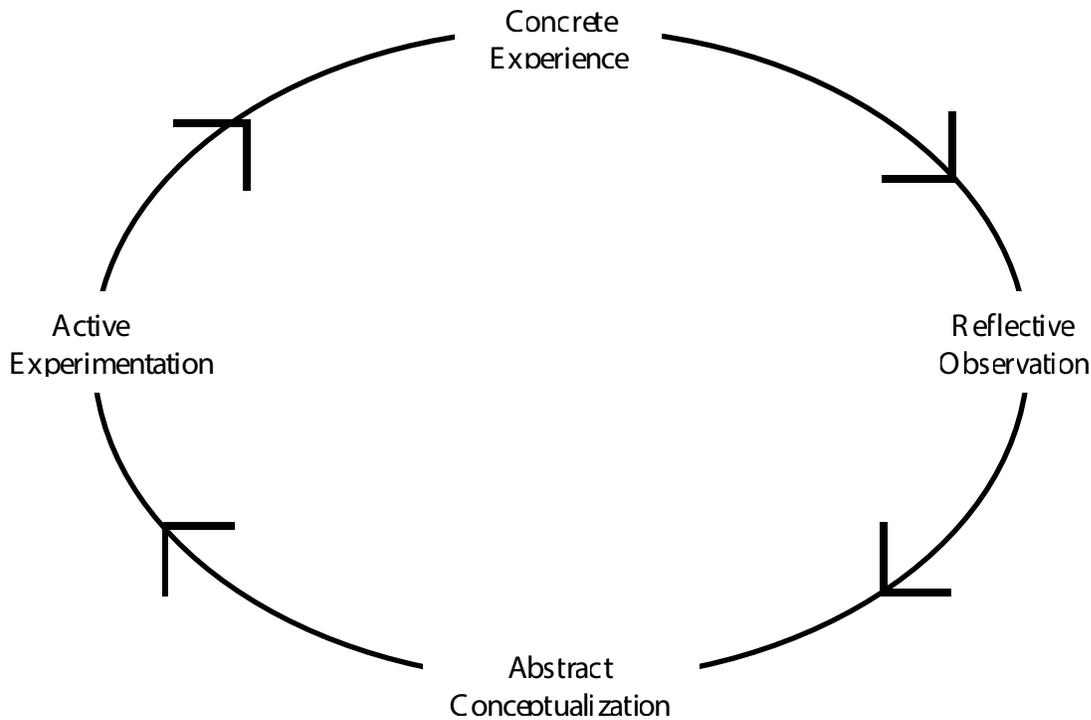
Step 7: Integrate All Steps of the Experiential Learning Process Into Your Challenges

Experience is a source of learning. However, it is not learning and no credit is granted for experience alone. Only experience that is described, examined, conceptualized, and applied in new situations will demonstrate a full measure of college-level learning. Credit for experiential learning will depend on how well you demonstrate this complete learning process in your portfolio.

Figure 2 illustrates this process and provides a framework to help you construct course challenges that integrate all elements of the learning cycle thereby demonstrating learning in a clear, precise manner.

In order for your course challenges to demonstrate learning, they must exhibit the four elements outlined in the learning cycle:

Figure 2. The Process of Experiential Learning



(David Kolb, Learning Style Inventory, 1976)

Concrete Experience: The first step is to describe your experience(s). You should state as specifically as possible exactly what you did (include duties, skills, and responsibilities). Remember to answer all relevant who, what, where, when, how long, why, and how questions.

Reflective Observation: As previously stated, the experience by itself means little until you start reflecting on its meaning and making judgments about its significance. This might involve comparing, contrasting, classifying, defining, and/or determining causes and effects. In other words, you will be looking for patterns in your experiences. Answer such questions as: What learning came out of the experience? What problems arose? How did I resolve them? What did I learn from both the positive and negative aspects?

Abstract Conceptualization: Based on the reflection of your experience, you can now begin to conceptualize theories and principles. These may be theories that you develop and/or those well known in the field. At this point citation of related readings could be useful in clarifying your knowledge of these concepts for the evaluators. Normally, this step will involve making reference to concepts as they are stated in course descriptions and syllabi. It is recommended that you refer to the texts listed in the course syllabi.

Active Experimentation: In the final stage, you will try to look beyond the immediate learning experience, asking yourself if the knowledge is applicable to other situations. If so, have you applied it to different situations? If not, how you might apply it? This would include an explanation of how the concepts worked in practice. Applying/testing your new learning outcomes in various situations is an important characteristic of college-level learning.

Once you have identified specific courses to challenge, draw up a final draft of your Educational Plan indicating courses you plan to challenge in your portfolio. The clearer your idea of which courses you plan to challenge, the easier your task will be in Phase Three.

If you discover other courses to challenge during Phase Three and you wish to change your Educational Plan, you must consult with your IDST 250 instructor before making any additions or deletions. You might also need to revise your autobiography.

Step 8: Essential Elements of Course Challenges

The main writing project in IDST 250 is to complete two course challenges. To pass IDST 250, you must submit the final draft of your educational plan, the final draft of your learning autobiography, and the course challenges to your instructor.

The first step is to select several courses to challenge. Much of the content of your final portfolio will pertain to these course challenges. In them, you will discuss what concepts you have learned by experience and how you have learned them. You will also demonstrate that your knowledge matches the concepts outlined in the syllabi of relevant college courses. We recommend the format below for each course challenge.

A. The heading should contain:

Course number and title (e.g. BNMG 423
Entrepreneurship)

Credits you are requesting (4 semester hours)

Course description (copied from catalog)

B. Copy of course syllabus (fewer than 2 years old)

C. Narrative, description and analysis of your learning

D. Documentation and/or Learning Products

Step 9: Writing the Narrative

The narrative and analysis of your learning is an essential essay that you write to demonstrate the concepts you have learned and to explain the process through which you learned them. In the classroom we generally refer to this as what you have learned (Analysis) and how you learned it (Narrative). You will find a sample course challenge for BNMG 423 Entrepreneurship, accompanied by a critical analysis in Section D.

Your narrative and analysis will include all four aspects of the experiential learning process (note that your narrative will tend to be “sandwiched” between parts of your learning analysis). Although variability in the style and structure of your presentation is quite acceptable, we generally recommend that in the introduction you present the major concepts you have learned about the subject in the order you plan to discuss them. These are the major “topics” of your essay. They represent what you have learned. In the body, expand on the major concepts; illustrate your mastery of them via critique of one or two relevant examples representative of your learning experiences (how you have learned) involving the topic. Discuss how these concepts may be applied to new situations. In the conclusion, summarize your reasons for requesting course credit and restate the name of the course being challenged, along with the number of credits you wish to receive.

Your knowledge of a subject area can be so extensive that you could write dozens of statements relating to the content of a single course. How do you decide which areas of your knowledge to discuss? First, look for the course objectives found in many course syllabi; they describe what the student who successfully completes the course can expect to learn or be able to do.

An economics syllabus, for instance, may list as one of its objectives “to understand the historical development and current status of anti-trust law in relation to price-fixing, monopolization and mergers.” Your statement of learning could read “I know the history and procedures of anti-trust law in relation to price-fixing, monopolization and mergers and can apply this knowledge at the level of a middle manager in a large company.”

If the course syllabus does not include objectives, look at the subjects, or topics, to be covered by the class during the term, or look at the chapter headings of the text to be read, or the subjects of other reading assignments. Even key words in the catalog description of the course can give you suggestions for appropriate statements of your own competencies in relation to the course.

For example, the course description of a physical geology course suggests that the course will deal with such topics as “study of the earth’s crust and mantle,” “formation of rocks and minerals,” “erosion,” “volcanism,” and “mountain building.” If you are a “rock hound,” you could write statements of your competency in relation to one or more of these topics. The topic on formation of rocks and minerals, and procedures for explaining and locating agates, geodes and other collectible gems and rocks. Because of this knowledge, I am frequently invited to talk to groups about this subject.”

Your learning statements (“topics”) are essentially opinions. You need to provide evidence that validates your opinions. In the body, you will expand those learning statements (contained in your introduction) to include narratives and analysis.

Narratives are essentially reconstructions of your experience. They often read much like explanations of what you did, where you did it, when, how, with whom, with what equipment, and what additional training or presentations you may have encountered. The narrative portions of your challenge essays will tend to focus on Step 1 of The Process of Experiential Learning (Figure 2). However, because the process of writing a course challenge tends to be recursive (that is, it “doubles back” on itself in a complex manner), you may also find yourself doing some analysis and perhaps even some conceptualization at this point. Include your supervisors and bosses, the individuals for whom you were responsible, and their academic credentials where relevant. Name any important machines, special processes, books, or terminology used in your experience. If you are describing non-credit courses, include the name of the institution and the credentials of the instructor. Below are some examples.

“In my experience as a legal aide at Legal Eagles from September 1983 to August 1984, I spent two full days per week researching cases for clients, especially in the area of divorce law. On a typical day, I would begin by selecting four or five case files, taking them down to the County Courthouse case archives, and examining similar cases that had already been adjudicated. During this process I would take notes, examine similarities, and record differences. After lunch I would...”

“I have held the position of Marine Terminals Business Manager in the Port of Cohote since November 1976. In this position my duties include developing annual operating budgets, monitoring the financial statements, and preparing capital budgets. Developing the annual budget statement involves the following steps...”

“I have been a volunteer at the New Hope Community Church in Redmond, Washington for a period of four years under the supervision of Senior Pastor Doug Newly. During the four-year period I was responsible for leading weekly prayer groups attended by 6-12 adults. Rev. Newly had the following qualifications...”

“These sub-committees used the SWOT analysis to determine the opportunities and threats of our external

environment, and our strengths and weaknesses of our internal environment. Each subcommittee formulated....”

“I attended a nine-week course sponsored by the Clatsop County Mental Health Center. The course, STEP (Systematic Training for Effective Parenting), was taught by Hannah Smith. The instructor’s qualifications included a Master’s in Social Work and...”

As you write your narratives, keep in mind the importance of discussing your learning experiences in detail. How you have learned the procedures, practices, and routines you followed is essential information. We tend to assume that if we simply state that we have been employed as a supervisor for 10 or more years, those reviewing our portfolio will automatically give us credit for knowing something about supervision. If we say that we have read the collected works of D.H. Lawrence, reviewers will assume we know all about D.H. Lawrence. Reviewers need more evidence of our learning than a statement of who we are and what we have done. It is not sufficient to say, “I was a legal aide for five years.” It is better to say, “In my five years as a legal aide, I spent two full days each week researching cases for clients, especially in the area of divorce law. During this time I became familiar with the three basic books used to do background research on cases (name them), and I learned how to compile a list of court precedents.” Narration should include descriptive details and quantities (statistics) whenever pertinent, particularly when they reflect well on your competency. For example, saying you supervised a sales team is not as potent as saying that “over five years I moved from supervising a sales team of four to a sales team of 20, increasing sales by percent annually (10 percent above similar branches of the company).”

Although necessary, narration is not sufficient to establish credit. You also need to analyze, conceptualize, and apply what you have learned. You will do all three in the analysis section of your course challenge, focusing on reflective observations, abstract conceptualization, and active experimentation and of The Process of Experiential Learning (Figure 2). Your analysis will demonstrate that your learning has theoretical as well as practical aspects, can be applied generally, and is measurable. Your analysis should examine theoretical as well as practical aspects of your learning. Learning acquired through life experience is frequently more practical than parallel learning acquired in the classroom setting. Therefore, evaluators will want to know that you grasp the underlying theoretical and conceptual aspects of their discipline at a level equivalent to the classroom student. You can accomplish this by naming recognized theories and authors and recounting some of their key concepts. If you elect to demonstrate your knowledge by referring to the ideas of others, be certain to give credit to your sources. Be accurate in your explanations, use terminology correctly, select theories that are acceptable in that field, and provide a bibliography. The following excerpt may clarify how to demonstrate familiarity with recognized authorities:

“From reading the works of Gerald Patterson, a behavioral psychologist, I learned that human behavior is primarily a learned phenomenon ... and that aggressive behavior

is learned and maintained as a result of environmental consequences.” (request for Child Development credits)

The author of this excerpt has shown conceptual understanding of underlying approaches to handling an aggressive child. If the author’s analysis had merely explained how he or she had controlled the aggressive behavior of one aggressive child, the criteria of general applicability or conceptual understanding would not have been met. You may discover that you have a general understanding of key concepts and terminology, yet feel hesitant to commit your knowledge to paper. You may gain the necessary confidence by checking out a textbook and reviewing appropriate use of terminology in the discipline. Reference to the works of experts, however, is not the only way you can demonstrate your grasp of theoretical learning. Your own observations and experiences may have led you to equally valid understanding. Both of the following examples demonstrate valid learning:

“I learned that it is important not to make value judgments in an interview. This is important even if the value judgments are positive because the interviewee may assume that if I am making positive judgments, I am also apt to make negative judgments. Also, positive value judgments tend to set up ideals and standards which the interviewee may try to fit.” (request for Human Resource Management credit)

“By closely watching people’s reactions when their body space was being infringed upon, I was surprised to see both citizens and police officers alike were affected. I observed that a number of changes occurred as a person moves deeper and deeper into another person’s body space. First, a light apprehension demonstrated by shifting of weight from one foot to the other or...” (request for Interpersonal Communication credit)

Your analysis should demonstrate general applicability by summarizing what you learned from a specific experience.

“From Annie Painter’s Print Communication Workshop, I learned how people are inclined to listen to or read what appeals to personal need and feelings. Painter’s workshop emphasized the importance of ‘to the point, eye-catching’ promotional materials ... I’ve begun to use less ‘wordiness’ in the fall publicity.” (request for Marketing credits)

The characteristic of general applicability places value on the learner’s ability to transfer skills and knowledge from one experience to another. Therefore, if you can show that you were able to apply what you learned in one place to a task performed at a different time and place, you will have provided good evidence of learning.

Your analysis should address the measurability of your learning.

For every competency you claim, try to present evidence showing you learned it successfully. Much of this may be included as official documentation (for example, a business letter you have written or an award you have received for your outstanding gourmet cooking). You may include in your analysis additional indicators of your level

of accomplishment. Feel free to “blow your own horn”. Modesty is counterproductive when you are trying to convince an evaluator that you deserve credit. The following are examples that would give evaluators insight into the measurability of the student’s levels of achievement.

“When the budget form I designed came into use, the number of budget meetings dropped from twice a week to once a month.” (Financial Management)

“Because of my approach, I had the lowest number of violators plead not guilty while having one of the highest number of traffic citations issued in the Department.” (Interpersonal Communication)

“I started teaching my friend’s two daughters in 1973. Through her acquaintances, and with a favorable reputation, I acquired 11 students during the 1973-74 year.... In the spring of 1975, seven of my students were entered in the annual Music Festival sponsored by the Federation of Music Teachers. Five of them earned a superior rating (the highest rating) and two of them earned an excellent rating (the second highest).” (Fundamentals of Music)

“I sold 520 vacuum cleaners in three months; 212 more than the company average.” (Sales)

“When I was seeking public office, I would examine the nature, size, and special interests of each audience. Then, while giving the same basic speech, I would vary my delivery, emphasis and examples. When I spoke to the Camas Plywood Mill I took off my coat and tie and related stories about my days as a truck driver, and talked of plant closure. An hour later I could be talking to a group of school teachers in a coat and tie, addressing the need for child care and equal pay to the primarily female audience.” (Communications)

Your analysis should discuss the documentation that will be included and your relationship to the documentation.

“Exhibit H shows the agenda for a training which I took with Dr. Janet Bennett for a total of 15 hours. This supports the fact that I understand communication styles of African-Americans, Hispanics, Asians, etc.

Exhibit K is the agenda that I used for training co-workers on the use of our computer system for keeping track of...”If you have used a course outline as a blueprint for your introduction, as we recommended, you can easily organize the narrative and analysis of your learning. Let’s say the course is Linfield’s Human Resource Management. The course discusses motivation, group-dynamics, organization, decision-making, communications and five other topics. The narrative and analysis of your learning can begin with what you have learned about motivation, then continue with your knowledge of group dynamics, and so on.

Using the Human Resource Management course as an example, we suggest that for the motivation topic you restate from your introduction what principles you have learned about motivation (analysis), reconstruct in narrative the experiences which taught you about those principles

(narrative), then apply the principles to different (but pertinent) circumstances (analysis).

Let’s say that one thing you learned is that a supervisor with a positive attitude toward his or her workers is more likely to encourage productivity on the job than one who has a negative attitude toward workers. This, you say, is consistent with McGregor’s Theory X and Theory Y. You then describe the job you had, the people you worked with, the problems you faced in motivating workers, and how you addressed those problems. Finally, you discuss how the general principle can be applied in different circumstances. As you discuss your learning, your narrative and analysis may read like a text or article on the subject. However, a significant difference will be that you have written your analysis in the first person singular (“I”) point of view, and you have illustrated your discussion with personal narrative examples. Specific, detailed narrative examples demonstrate that you understand the concepts well enough to apply them.

After you have narrated and analyzed each learning statement in the body of your essay, a simple conclusion is usually best. We suggest that you summarize your reasons for requesting credit, then follow with a request for a specific number of credits, along with the name of the institution from which you acquired the syllabus, and the course number and title.

A common question at this stage is “How long should my course challenge be?” The answer to this question depends upon two factors: (1) the number and complexity of competencies listed in the course description and syllabus, and (2) the competencies you can effectively address through official documentation and/or demonstrations. A narrative and analysis of your learning should be supported, whenever possible, by official documentation and/or products of your learning: evidence of your learning provided by photographs, certificates, diplomas, samples of your work and other appropriate records. Documentation can serve you in two ways: it helps you officially verify the learning presented in your narratives and analysis, and it provides additional information reviewers can use to evaluate your learning.

Furthermore, appropriate documentation can substantially reduce the amount of information you need to include in the narrative and analysis of your learning. The syllabus of a training program in which you participated and the certificate of your completion of that program verify the learning you have acquired. These documents give reviewers information about the content of the program that can be useful in evaluating your request for credit. For instance, if you are challenging a course in Entrepreneurship, a copy of your bank loan application, business plan, and financial statements, combined with a discussion of your business experience would be sufficient to gain full credit.

Similarly, for 3 credits in Creative Writing, work published in recognized magazines or by recognized publishing houses would more than adequately support a brief narrative and analysis with an accompanying request for credit.

On the other hand, in the absence of such official documentation and/or learning products, you would almost certainly need to present a lengthier description of your learning experience and analysis in relation to each topic on the course syllabus. This could easily be supported by a twenty-page learning essay.

An inverse relationship exists between the amount of learning discussed in the narrative and analysis and the amount of learning for which you have official documentation and/or learning products. The more strongly these testify to your competencies, the less you have to build a written case in support of your learning. Conversely, the weaker your documentation and/or the fewer learning products, the more narrative and analysis you will have to provide to support your claim to know each objective.

If you have no supporting documents whatsoever and can find no sources of evaluation from others; you will need to write an extensive narrative and analysis.

For an example of the brief narrative and analysis-strong documentation relationship, let's look at Judy's request for 2 semester credits for Responding to Emergencies, CPR. In researching the course, she learned that the purpose of the course is to prepare the student to take the CPR and First Aid Red Cross certification examination. Since Judy holds a current Red Cross First Aid and CPR card, she could include a copy of it as documentation in her portfolio. Since the card is recognized proof that her learning is the equivalent of the typical student in the course, she is spared the task of describing her learning at length.

In contrast, Sam's situation exemplifies the lengthy narrative and analysis-weak documentation relationship. Sam has read innumerable books about the Old Testament as well as directly studying the Bible. He locates a course outline and learns that students taking RELS 120 Old Testament have "insight and sensitivity to the literary, historical, and theological approaches to Biblical traditions." Sam thinks he has equivalent learning, but can offer no official documentation. Sam's analysis provides an in-depth examination of many books of the Old Testament, including references to his historical, literary, and theological understanding. Sam's lengthy analysis is complemented with a bibliography, which serves as documentation.

Here are some examples of types of documentation and learning products you can use:

Verification of Accomplishment - awards, newspaper clippings, musical or theatrical programs which feature your name, letters of recommendation or congratulation for good performance, admission to special groups, letters of acceptance, books published, patents obtained, evidence of suggestions adopted (memos, etc.).

Direct Evidence - test scores, bills of sale, copies of exams you passed, a list of books read or countries visited, lists of all your products or inventions, non-credit course transcripts.

Descriptions - job descriptions, course outlines or syllabi of classes you have taken, explanation of ranking, rating or classification systems in your organization, explanation

of tasks performed, performance standards for acquiring licenses or certificates, membership requirements, diaries of trips you have taken.

Certification - professional licenses, badges, etc. designating rank attained, certificates of completion for non-credit seminars and/or training sessions, diplomas, military papers.

Testimonies to Competence - rating forms and performance evaluations, evidence of promotions based on merit, letters of evaluation.

Learning Products - all samples of your own work: forms you designed, letters you wrote or typed, books you authored or edited or reports you produced, works of art or products of your craft, tapes of conversations with experts, inventions, butterfly collections, machines designed or plans drawn, recordings of your speeches, course outlines you wrote, plants you grew, your grant proposals, learning essays (papers you write specifically to address topic assignments in a syllabus).

Your documentation may vary from "soft" to "hard" evidence in supporting the learning you have claimed. The "harder" the documentation the more reliable it is as evidence of your learning. The Evidence Continuum in Section C provides a continuum ranking documentation according to the strength of its effectiveness.

List the documents you hope to include for each course request, send out any inquiries or request for copies as soon as possible. This will allow distant agencies and former employers time to reply. It will also give you time to explore other alternatives if there is no response. If you have a choice, one good document which demonstrates a variety of your skills and knowledge is better than a collection of separate documents. A single document can be used to support as many different course objectives and as many different courses as is relevant. If you have a lot of documentation, don't try to include it all. Simply include one or two of your best documents in the portfolio; then add a list of whatever you have in addition. Evaluators can ask you to bring in other items as they wish.

Coordinate your written explanation of learning with documents which support it. You can do this by referring to supporting documents (in the text) and citing their page numbers. For example, write, "As documented on page 25, I trained four work-study students in the use of our electronic calculator."

Be sure to label each document and tell what it is (for example, "newspaper clipping describing my involvement in management games"); also give each document a page number whenever possible.

At the end of each written explanation of learning include a list of the documents that support the credit request, including their page numbers.

Try not to worry if you can't get documents to support all your competencies. Documentation may make your case more convincing on paper and easier to evaluate, but it is only one tool of the many that you may employ. If you have

the learning you claim, you will be able to demonstrate it even if you have no documentation on it at all.

Each document should be clearly labeled. If its significance is not obvious, a short statement should describe the document and explain how it supports the request for credit.

Step 10: Write Remaining Course Challenges

As we explained in the introduction, the steps to completion of your portfolio follow a logical sequence, but you are likely to depart from the sequence as the portfolio develops.

Once you have submitted your first challenges you are ready to prepare a narrative and analysis for each of the additional courses you will be challenging through the portfolio.

It is important that your portfolio instructor review drafts of your materials as you proceed. He or she will then be able to confirm that you are on the right track to make suggestions that can save you time and energy.

In contrast to traditional classes, your portfolio instructor will continue to work with you after completion of the class until you have finished your portfolio. Your portfolio instructor will ask you to submit a timeline. As you complete each Narrative and Analysis, you should arrange (in advance) for a mutually acceptable time to submit it. Your portfolio instructor probably has other student work to evaluate, and you will need to be patient. If it is necessary for you to delay completion, you will still be asked to provide your instructor with an update once per semester.

Step 11: Assemble Your Portfolio

Linfield requires that you organize your portfolio according to the following format:

- I. Cover page
- II. Table of contents
- III. Educational Plan and Transcripts
- IV. Learning autobiography
- V. Course Challenge #1
 - A. Heading
 - B. Copy of current syllabus
 - C. Narrative, description and analysis
 - D. Documentation and/or Learning Products
- VI. Course Challenge 2, 3, 4, etc. (Same format as for 1 above)

Your completed portfolio is viewed as your best effort to represent your learning. Have your portfolio proofread for spelling, grammar and clarity. A neatly typed and organized document will reflect positively on your skills and standards.

Although you and your instructor are close to the portfolio and familiar with the contents, the evaluators lack this advantage. Therefore, anything you can do to assist portfolio readers in locating pertinent information will be helpful.

Include a table of contents, number all pages, and title all sections clearly.

Step 12: Submit the Draft Portfolio to your Instructor for Review and Signature

Before you submit a final copy of your portfolio, you must submit a draft copy to your portfolio instructor for feedback and signed approval. Your instructor should review the entire contents. While not an expert in every area, he or she has been trained to recognize a well-supported request for credits. Incorporate your instructor's feedback into the final copy before submitting it for review.

Your portfolio instructor must provide written documentation that he or she has reviewed your portfolio and believes that it is ready for submission. He or she may give you a letter or, alternately, sign the form found at the end of this guide.

Step 13: Submit Your Portfolio

Final copies of your portfolio are to be uploaded to Taskstream, the colleges ePortfolio site.

Instructions can be found on the [Taskstream Website](#).

If you plan to graduate at the end of spring term, you must submit your portfolio no later than September 1 of the preceding year. Portfolios submitted after this date may not receive prompt attention.

Linfield portfolios are evaluated by faculty members who have expertise in the areas challenged. When the evaluation is complete you will receive a report summarizing the conclusions and listing credits awarded.

The credits awarded will be put on your transcript when you have completed six Linfield credit hours. Credit for prior learning will be indicated as "CPL" on the transcript next to the course number and name. A "P" for pass will appear in the grade column. It will appear as P/CPL.

If you have been denied credit for a course challenge, the portfolio evaluator will often note which topics or objectives you did not adequately address. In many cases the evaluator may note that he or she would be willing to consider a resubmission addressing the identified deficiencies. In other instances, the evaluators may not specifically invite a resubmission, but (upon reading the rationale for denial) you may feel competent to address the identified weaknesses with new evidence in the form of additional essays and/or documentation. In such cases you will be given two to four weeks to redraft your challenge(s). If you are rewriting areas originally submitted as part of the portfolio, there is no additional charge for the resubmission.

SECTION C: FORMS

Form 1: Learning List

Major Topic	Description of Duties & Responsibilities of Activities	Learning & Skill that Resulted	Possible Document
Employment			
Education			
Volunteer Experience			
Recreation/Hobbies			
Military Experience			
Licenses/Awards			
Travel			
Computer Skills			
Independent Reading, Viewing, and Listening			
Conversation with Experts			

Form 2: Educational Plan

I. Educational and/or Career Goals:

II. What I Have Already Received Credit For:

Transferred Regular Credits:

Transferred Paracurricular Credits:

Linfield Credits:

Total Semester Credits Completed to Date:

III. Classes I Still Need to Take:

IV. Courses I Am Requesting in Portfolio:

V. Recap

Total Credits Transferred to Linfield: _____

Total Credits Completed at Linfield: _____

Total Credits Remaining to be taken at Linfield: _____

Total Credits Requested in Portfolio: _____

Grand Total Credits _____

Signed

Advisor

Form 3: Portfolio Checklist

Student Name _____

Reviewer's Name(s) _____

Portfolio Overview

Organize your portfolio according to the following format:

- ___ 1. Cover Page
- ___ 2. Table of Contents
- ___ 3. Educational Plan and Transcripts
- ___ 4. Learning Autobiography
- ___ 5. Course Challenge #1
 - a. Heading
 - b. Syllabus
 - c. Body
 - d. Documentation
- ___ 6. Course Challenge #2, #3, #4, etc.

Course Challenge #1

a. Heading:

- ___ Did you put the name of the learning area at the top of the page?
- ___ Did you list the number of the course and the course title?
- ___ Did you list the number of credits you are requesting?

b. Syllabus:

- ___ Did you have adequate information about the course?
- ___ Which of the following did you use to learn about the course?
 - ___ Course Description from catalog.
 - ___ Course Syllabus.
 - ___ Texts.
 - ___ Discussion with other students who have taken the course.
 - ___ Discussion with professor or faculty in same discipline.
 - ___ If you have a syllabus, is it current?

c. Body

Narrative:

- ___ Did you give an adequate description of your experience?
- ___ Did you include:
 - ___ Your main duties or activities in a specific job or organization?
 - ___ Your relationship to others?
 - ___ Any special equipment's, systems, or books you used?
 - ___ Any special conditions surrounding your learning?
 - ___ Non-credit classes or seminars you attended and qualifications of the instructor?

Analysis:

- Did you cover each of the areas listed in the course description?
- Did you discuss what you learned as well as how you learned it?
- Did you use examples of how you applied your learning?
- Did you include conceptual learning (your own or application the theories of others)?
- Did you give any evidence that you learned what you claim successfully?
- Did you show that your learning is applicable to more than one area?
- Did you use terminology, names of people, or specific theories?
- Did you discuss the learning you acquired through books, classes or workshops?
- Do you refer to your documentation within your narrative and analysis?

d. Documentation:

Official Documentation and/or Learning Products:

- Is it clear how your documentation supports your request for credit?
- Does your documentation have a title and a page number?
- Is your documentation clearly labeled and easy to locate?
- Are the qualifications of the persons writing letters clearly stated?

Which type(s) of documentation best supports your learning?

- Descriptions
- Direct Evidence
- Testimonies of Competency (letters)
- Certification
- Verification of Accomplishment
- Are the qualifications of the persons writing letters clearly stated?

Now that you have read through this guide at least once, you're probably feeling excited and eager to begin your prior learning adventure. Linfield, your classmates, your family, your professor, and your colleagues will all help you as you work hard writing your portfolio. And remember . .

You Deserve the Credit!

SECTION D: EXAMPLES

Sample Autobiography

I was fortunate to grow up as the eldest child in a stable two-parent family. My mother was a stay-at-home mom who was very involved in the lives of her children. My father was an entrepreneur who owned and operated his own printing business. My parents were excellent role models who instilled strong character traits in each of their three children. We all learned the importance of working hard for what you want, completing what you begin, respecting others, honesty, trust, loyalty, and frugality. My parents paid cash for everything, as debt, credit card or otherwise, was not acceptable. The values I learned as a child are the values I live by today.

It was in my late twenties that I got serious about the importance of proper nutrition and physical fitness and began eating right so I could enjoy running and exercising regularly. Since then, nutrition and fitness have been a regular and important part of my lifestyle. Most of my methods of staying fit have been solitary in nature and have been activities such as running, bicycling, roller skating, weight lifting, doing aerobics, yoga and windsurfing. Now fitness is such a part of my lifestyle that I have both a mental and physical need to exercise regularly.

Over the years I worked at several different jobs, but I began my favorite job in 1979 working as a part-time bookkeeper with Dr. Stout, who had come from Michigan to purchase an existing Orthodontic practice in Portland. I was hired during the transition of ownership between the two Orthodontists. I began working several hours a day doing accounts receivable and collections. I quickly had those functions under control and was anxious to expand my duties. Fortunately, I was offered the chance to take over accounts payable and payroll functions. Soon I was acting as full-charge bookkeeper. The longer I worked there the more I wanted to work with the patients and learn orthodontic assisting. So I began training with the doctor and the other assistants.

When I divorced in 1982, I found that I needed a full-time job in order to support my son and myself. Dr. Stout offered me a full-time position at a living family wage. I immediately enrolled in an X-ray certification program and became his first assistant to hold that credential. Later I took the training needed to receive my EFDA certification.

When my son was 12 he decided to live with his father. I had been dating the man who became my second husband for several years. We decided to get married and take an extended vacation. In preparation, we studied conversational Greek for about six months and learned to read the Greek alphabet. After we got married we took off on a one-year honeymoon. While traveling, I did a lot of thinking and read a lot of books about making career decisions. By the time we returned from our travels, I knew that I wanted to pursue my Bachelor's degree.

We had planned to stay in Greece for the entire time, but as the weather turned cold, we decided to travel around the world. We spent several months traveling through Western Europe, then flew to Thailand where we stayed for several

months, exploring northern Thailand and the surrounding countries. Our travels also included Malaysia, Indonesia, Bali, Australia, Tahiti, and back to Portland.

After coming back to reality, I was offered a part-time job as an Administrative Assistant for a Financial Planner within a couple of weeks of beginning my job search. I also started attending school at Portland Community College. Unfortunately, I found my job did not give me enough challenge and I was bored. So, I began looking for another job, something that would challenge me.

I was offered the job of Aviation Finance Technical Coordinator for the Aviation Finance department at the Port of Portland. At the time I was hired, I had no experience with computers and had to learn computer skills on the job. Being a self-motivated learner, I became very proficient with word processing, spreadsheets, and data processing. With the support of my employers I began to pursue my education seriously because I knew that holding a degree was critical to my desire for career advancement.

During the next six years, my responsibilities increased at Aviation and I was promoted several times. In 1994, my supervisor was suddenly terminated. I realized that I wanted to advance and asked to be given a chance to take over his responsibilities. Being a self-motivated learner, I began tackling my new responsibilities with vigor. I have been told many times by my manager and others in the organization that there has never been another employee who has mastered the responsibilities of this complex position as well as I have, while also maintaining an excellent relationship with all of the departments that we must interact with.

By this time, I had completed my Associate's Degree in Business Administration at PCC. I was tired of school and decided to take some time off before I began the final two years of my education.

My husband and I had been developing, testing, and perfecting a gutter-cleaning tool for several years. We began the patenting process on The Gutter Cleaner and received the patent on July 4. Our dream was to sell our gutter cleaning tool on the national market. Consequently, I began reading books on many business-related subjects with the intent of establishing our own wholesale/retail business. We applied for a business name, designed our own advertising pieces, and negotiated with potential wholesale customers.

We still own and operate our business, but the initial enthusiasm has dwindled and we are trying to either sell or license the patent. As our motivation for pursuing the business lessened, I found that I really wanted to return to school and pursue my degree. After evaluating a number of competing programs, I decided that I would apply to Linfield College, where I would complete my degree in Management. One of the reasons I am pursuing my degree, in addition to my personal goal, is that I believe that I will be even more effective in my position when I am armed with the most knowledge and widest perspective possible. I believe that knowledge is power.

Currently, as an Aviation Finance Manager, I am responsible for managing the sources and uses of capital funds for the Aviation division's four airports; managing Aviation's capital budget, which exceeds \$3 billion dollars over the next 20 years, as well as managing the overall Aviation capital process. My duties also include developing and administering the federal funding programs, determining the appropriate timing for issuing revenue bonds that will fund capital projects, and participating as a team member in the issuance of this debt. I also participate in a number of internal planning teams that has broadened my knowledge of other

department's responsibilities and concerns, and has increased my effectiveness in the role I play in the organization. Finally, I have participated in the interviewing and hiring process for several open positions.

I have been challenged by my work, by the additional responsibilities that I have shouldered as I have progressed in the department and feel proud that I have succeeded. I am confident that I will complete my education and will be successful in earning the credit for prior learning that I seek, as I have learned a lot since I graduated from high school.

Sample of Significant Learning

Major Topic	Experience	Duties	Learning & Skill that Resulted	Possible Document
Employment	Bookkeeper in an Orthopedic Clinic	Scheduled Appointments Accounts Receivable Accounts Payable Payroll General ledger Financial Statements X-rays Dental Assistant	Bookkeeping Dental Assisting Dental X-rays Receptionist duties Interpersonal Skills	
Travel	Travel	Traveled in Greece, Holland, France, Belgium, Portugal, Spain, Thailand, Malaysia, Indonesia, Bali, Australia, Tahiti	Customs and culture of countries visited Greek language and alphabet Cross cultural communications	
Employment	Aviation Finance Technical Coordinator	Statistics Data Base Income statements Accrual information Revenue analysis Invoicing functions, Parking validation program Reconciling bank statements with receipts Petty cash Clerical support Interviewing, hiring and supervising Strategic planning	Investment strategies Computer applications Information gathering Management of human resources	
Employment	Aviation Finance Specialist/ Analyst	Maintain capital budget Monitor account balances Prepare quarterly accounting adjustments Maintain fixed assets system Develop and maintain debt service allocation Train other employees	Communication skills Training skills Financial Management	
Employment	Aviation Finance Manager	Supervise other employees Manage finance department Manage capital funds & budget Manage federal funding programs	Management of human relations Government regulations Stress management	
Employment	Developed Small Business	Patent product Market product Did books for business Wrote business plan	Patent process Marketing & sales Business structure Product packaging Small business accounting	
Recreation/ Hobbies	Active in physical activities and practiced good nutrition habits	Running, bicycling, roller skating, weight lifting, aerobics, yoga, windsurfing, scuba diving Ate wholesome foods	Personal Health Promotion Basics of weight training, cycling, aerobic dance, scuba diving, jogging	

Sample Educational Plan

I.	Educational and/or Career Goals	
	To acquire a Bachelor's Degree in Management from Linfield College so that I will have greater opportunity for advancement within my profession.	
	To have a degree that would qualify me for admission to a Master's Degree in Business Administration.	
II.	What I Have Already Received Credit For	
	Included on the following pages are transcripts from Portland Community College and Linfield College.	
	Portland Community College	64 semester credits
	CLEP Test	3 semester credits
	Semester Credits Completed at Linfield	23 semester credits
	Semester Credits Completed to Date	90 semester credits
III.	Classes I Still Need to Take	
	ENGL 230 Children's Literature	4 semester credits
	COMP 382 Management Info Systems	3 semester credits
	BNMG 310 407 Organization Behavior and Management	4 semester credits
	BNSS 495 Strategic Management	4 semester credits
	HIST 257 Pacific NW	3 semester credits
	Total Semester Credits: Linfield College	18 semester credits
IV.	Courses I am Requesting in Portfolio	
	HHPA 025 Weight Training	1 semester credit
	HHPA 029 Cycling	1 semester credit
	HHPA 062 Aerobic Dance	1 semester credit
	HHPA 067 Scuba Diving	1 semester credit
	MSCM 275 Information Gathering	4 semester credits
	BNMG 423 Entrepreneurship	4 semester credits
	BNMG 405 Human Resource Management	4 semester credits
	BNFN 447 Investments	4 semester credits
	TCCA 230 Intercultural Communication	3 semester credit
	SOAN 230 Peoples & Cultures of South Asia	3 semester credits
	HHPA 180 Personal Health Promotion	2 semester credits
	HHPA 230 Stress Management	2 semester credits
	Total Semester Credits: Portfolio	30 semester credits
V.	Recap	
	The following is a recap of the totals of my educational plan:	
	Total Credits Transferred to Linfield College	67 semester credits
	Total Credits Completed at Linfield College	23 semester credits
	Total Credits Remaining to taken at Linfield College	18 semester credits
	Total Credits Requested in Portfolio	30 semester credits
	Grand Total Credits	138 semester credits

Types of Evidence

Type of Activity

Work Experience	<p>Soft (if used alone, without other documentation)</p> <ul style="list-style-type: none">• Awards• Letters of commendation• Letters of corroboration from superiors, peers, clients without other documentation.• Congratulations on high performance <p>Medium (if used alone without other documentation)</p> <ul style="list-style-type: none">• Job descriptions• Promotion evaluations• Evidence of promotion• Explanation of ranking, rating or classification system in company or organization.• Licenses• Membership in professional or trade organizations <p>Hard</p> <ul style="list-style-type: none">• Samples of work produced• Evidence of suggestions adopted. Explanations of tasks performed.• License supported by performance standards for acquiring the license• Membership supported by requirements for membership in professional/trade organizations• Scores on licensing exams
Work Experience	<p>Soft</p> <ul style="list-style-type: none">• Commendations• Awards• Newspaper and magazine clippings• Letters of corroboration from co-volunteers, clients, supervisors <p>Medium</p> <ul style="list-style-type: none">• Any of the above soft documentation supported by a verified written description of activities <p>Hard</p> <ul style="list-style-type: none">• Evidence of training undertaken and completed as part of a plan to achieve the goals and objectives of service activities

Evidence Continuum (Cont.)

Type of Activity

Non-college Courses & Training	<p>Soft</p> <ul style="list-style-type: none">• Certificate of completion• Syllabus• Diploma• Letter verifying that student was enrolled in course <p>Medium</p> <ul style="list-style-type: none">• Number of assignments• Amount of time spent on outside assignments• Number of didactic hours• Number of clinical or practicum hours• Course descriptions/outlines <p>Hard</p> <ul style="list-style-type: none">• Course Objective/Learning outcomes• Evaluation instruments used in the course (tests, papers, etc.) and grade received
Special Accomplishments	<p>Soft</p> <ul style="list-style-type: none">• A list of books read• Exhibits• Speeches given• Records of conversations with experts (audio tapes) <p>Medium</p> <ul style="list-style-type: none">• Copyrights or patents obtained• Programs from performance activities• Proposals authored <p>Hard</p> <ul style="list-style-type: none">• Books published• Lectures (given on specific topics) with evaluations• Writing samples• Audiovisual presentations

(Reprinted with permission from the Sinclair Community College (Ohio) handbook for portfolio development)

Special Guidelines for Selected Documents

Learning Products

These are things you have made yourself. You can have these back after your portfolio has been evaluated and you have been awarded credit.

If you include the product with your portfolio, date and sign it. Label it to explain what it is (if not obvious). Give it a page number, if possible.

If you include a photo of the product with your portfolio, label, date and sign the photo. Be prepared to bring the product for display, or to take evaluators to your product (if requested). Number the page(s) on which photos appear.

Be prepared (if requested) to furnish proof (supplemental letter of verification, demonstration of sufficient skills, etc.) that you in fact produced this product.

Be sure to provide, or be prepared to provide, several examples of the products which support a claim for broad experience. For example, if you claim photography credit, you should be able to provide more than one or two of the photographs that you have taken. It is desirable that each example demonstrate a slightly different skill or ability.

Learning Essays

These are actually “learning products” in that they are something you write to demonstrate what you know about a subject. They are, therefore, something you have “made.” A typical learning essay is from 8 to 20 pages long. To request credit in a history course, for example, you might wish to write a long essay about the major periods covered by the course in order to demonstrate your knowledge and understanding of the subject matter. In presenting a learning essay, remember the following:

Be sure to warn evaluators of the course you are supporting with a learning essay, so that they do not mistake it for a long explanation of experiential learning.

Preface the essay with your name, the number and title of the course, the number of credits you request, and a description of the experiences in which you gained your learning.

Because most evaluators regard a learning essay as essentially identical to a research paper, a bibliography of material you’ve read or a list of experts with whom you’ve studied is a useful addition to such an essay. Remember to use an acceptable style sheet for preparing notes and bibliographies. The Modern Language Association Style Guidelines and the American Psychological Association Style Manual are the two most commonly used style sheets in colleges and universities across the nation. Most bookstores have copies, as do most libraries. In general, you may not include term papers that have been written as part of a college class for which you have already secured credit.

Direct Evidence

Direct evidence such as test scores and certificates of achievement may very effectively demonstrate that you have achieved the appropriate course objectives. For example, civil service examinations often test very specific competencies like typing speed, writing ability, etc. Professional licensing examinations such as the real estate examinations are often comprehensive and specific. Ideally, you should include in your portfolio a description of the competencies you were tested for (unless, as in the case of state licensing, this is well-known public information), then show evidence that you completed the task successfully (a test score, grade or certificate of completion). A note of caution: the testing agency must be one that the evaluators accept as reputable. Therefore, evidence that you passed a correspondence course or were accepted into an organization with special requirements might not automatically convince evaluators that you have attained the required competence.

Many students have taken non-transferable courses. A copy of your grade coupled with a course description and outline will provide evaluators with an accurate picture of your learning and how it corresponds to the transfer credit you are requesting. If you still have copies of papers or examinations from the course, these should be included.

Letters of Evaluation

These are one of the most common forms of documentation, but they require the most care. Remember, a letter of evaluation is not a letter of recommendation.

You are apt to increase the potency of your documentation letters if you have thought through the outcomes of a particular experience before requesting the letter.

It is imperative for you to discuss the portfolio process with the potential author of this documentation letter before you make a formal request for it. It is common courtesy to ask ahead of time if someone is willing to take the thought and time required to write a letter of evaluation.

To ensure that a potential letter writer understands the portfolio process, it is recommended that you give him or her a copy of the guidelines found on page 30. In addition, copies of the course description accompanied by the analysis you have written will help the evaluator address your specific competencies.

Write a letter clearly stating exactly what you need. An example of a very clear specific letter of request can be found below.

The evaluator should be asked to write about those relevant activities of yours that he or she observed directly. It is important that you not request evaluation from people who only know your work secondhand.

The evaluator’s letter should be written on letterhead stationery, if available, and must be signed.

Guidelines for the Person Preparing a Letter of Verification and Evaluation

(Used with permission of Marylhurst Education Center)

Linfield College recognizes that college-level learning takes place in a variety of settings. Therefore, a program has been established to evaluate and award academic credit for the knowledge acquired through life experiences. To obtain credit, students develop a portfolio containing description, analysis, and documentation of their previous significant learning experiences.

The following list is intended to help you provide an acceptable letter of verification and evaluation of the prior learning for which the student is now seeking college credit.

1. Send your written evaluation on letterhead stationery.
2. Include a description of your present position, pertinent past experience, and/or qualifications. A copy of your own résumé would be very helpful.
3. Identify your relationship to the student (e.g., supervisory), the situation in which you have observed him/her, the dates of the observation, and the position and responsibilities of the student.
4. State specifically which competency, skills, or knowledge you are assessing. In most cases, the student will inform you of these in advance.
5. Evaluate how well the student performed. Use statements such as: average, above average, exceptional, etc. Indicate the breadth and depth of knowledge that the student acquired through experience relative to your expectations of college-level learning.
6. Comment on how the learning was demonstrated or on the evidence of actual learning. Explain the basis upon which you have made your evaluation. If applicable, describe the techniques used to evaluate, e.g., interview, situational observation, product assessment, objective or written exam, or simulations.
7. Whenever possible, use comparative references to illustrate the criteria you have used. Phrases such as these would be appropriate: performed at the same level as my other employees who possess the bachelor's degree; performance exceeded all other volunteers (under my supervision) who have performed these same or similar duties. If you are still not sure which skills, knowledge or competency to assess, please feel free to contact the student and ask for the necessary specific.
8. Keep in mind that this letter is for verification and evaluation of the student's learning - not a letter of recommendation.
9. You may send the letter directly to the student.

Sample Letter of Request

Below is a sample letter of request to a former supervisor or colleague for evaluation of your experience and learning. Following this sample letter is the evaluation the writer received in response. Note that the letter requesting the evaluation is quite detailed and specific about the areas of learning that the writer wishes the evaluator to address, and the response will deal with those aspects in a way that parallels the letter of request.

The general rule is: the more specific your request, the more specific the reply, and the more likely your documentation will help you earn the credit you are seeking.

Dear _____:

As I mentioned on the telephone, I am enrolled in the Linfield undergraduate degree program in (state your major here). I would like your help in documenting my ability in certain areas. I am enclosing an explanatory form that Linfield suggested I send to those writing letters for me.

I have listed the areas I would like you to address. Whenever possible, please emphasize that my knowledge went beyond a basic understanding of the area and had both a theoretical and a practical base. I would like this verification because I am applying for upper-division credit for my learning experiences outside the classroom. In order for upper-division credit to be assigned, I must demonstrate understanding beyond the introductory level.

1. Property Organization:

Please document that I know the difference between the nature and kinds of property and that I have a high degree of understanding of the following aspects of property: types of real property, estates which are less than freehold, qualified or

conditional estates, and use of trusts. Also, please mention the positions I have held and the fact that I trained and evaluated legal assistants for your office.

2. Transfer, Liens, and Regulation:

When I worked for you as a legal assistant on cases representing the Department of Veterans' Affairs, I gained a great deal of knowledge about transferring titles, statutory liens, and other regulations pertaining to the use of real property. In the case of statutory liens, I had considerable experience not only with real property cases but with tax liens, judgment liens, and construction liens. I also trained legal assistants in these areas. Could you verify my abilities in this area?

3. Real Property Conveyancing and Title Reports:

You may recall that I spent quite some time, both inside the department and at legal assistant and secretary associations, learning how to interpret and write legal descriptions, and that I trained paralegals in this area. Please comment on my writing abilities when preparing legal descriptions, title reports, property conveyances, and title insurance policies.

4. Obtaining Information and Completing Foreclosures:

When we worked together, I always tried to maintain a high level of accuracy and practiced great care in researching materials to support our cases, particularly in identifying the parties involved and preparing bids for the Department of Veterans' Affairs in judicial foreclosure sheriffs' sales. I also learned how to compute the final bid in such cases.

In addition, while I prepared cases outside the department, I learned about foreclosures from a private institution's point of view.

Finally, I learned how important it was to accurately compute taxes on sheriffs' sales and to state those taxes precisely when preparing a case.

Could you please stress this aspect of my experience?

5. Document Preparation:

One of my most enjoyable tasks for the department was the selection, preparation, and compilation of documents and forms into manuals for the word processing, human resource management and legal assistants. Please comment on my organization and writing abilities in this area.

6. Mortgage, Trust Deeds, and Land Sale Contracts:

In addition to my daily work involving foreclosures, I also attended joint meetings with the Department of Veterans' Affairs Foreclosure staff. There we discussed land sale contracts, trust deeds, and mortgages on a regular basis. Please discuss my attendance at these meetings and note my ability to understand the issues we discussed.

I very much appreciate your willingness to help me document my knowledge and abilities in the area of real estate laws and instruments. I realize that an evaluation such as this requires time and care, but I am sure you are pleased that Linfield offers students with life experiences a way to earn credit for work we performed for our employers.

When you have completed the evaluation, please send the final letter to me so that I may attach it to my credit presentation as official documentation. If there is any other information you need, or if I can help you in any way in the preparation of this letter, do not hesitate to call or write.

Thank you for your valuable assistance.

Sincerely,

Sample Course Challenge and Critical Discussion

BNMG 423 Entrepreneurship - 4 credits

(The student requested, and was granted, the full 3 credits. The right-hand column includes comments from a portfolio instructor on the strengths of this essay, as well as a few suggestions for improvement)

Linfield Catalog Description:

Understanding the skills and motivation required for entrepreneurial success. Examination of start-up requirements; organization structure; legal, financial and human resources considerations. Emphasis on formulation of an effective marketing strategy in a small business environment.

Course Objectives (taken from syllabus):

- Choosing and developing an innovative idea
- Recognizing the entrepreneurial personality
- Selecting an appropriate form of ownership
- Building a powerful marketing plan
- Financial planning & cash budgeting
- Funding sources
- Operational planning
- Building a winning proposal

I grew up in an entrepreneurial family. My father owned and operated his own printing business, working very long hours every day, including weekends. I have memories of spending many evenings sorting through a troubled run of labels so that the order could be filled without requiring a complete re-run.

There are many products sold today that have a special place in my memory since Dad printed the labels for those products. I learned the mechanics of the office functions required to run a business first hand while working for my Dad during high school. Dad was honest, frugal, worked hard, and was an excellent role model. From his example, I knew from early childhood the dedication required to be a successful entrepreneur.

Innovative Idea and the Entrepreneurial Personality

Entrepreneurs generally exhibit certain qualities or personality traits that make them more likely to succeed as a self-employed person than those without these traits. According to Norman Scarborough and Thomas Zimmerer, these traits include a:

desire for responsibility, and a desire to control how resources are used;

preference for moderate risk, and the ability to spot opportunities others don't see;

confidence in their ability to succeed, and a high degree of continuous optimism;

In this course, both the course description and the course objectives list key topics to be discussed in the narrative and/or demonstrated by documentation.

It is important to note that theory is not as important in this course as it is in most 400-level courses. The emphasis, instead, is on understanding procedures and their application. Because it is a 400-level Business course, the evaluator will assume that the student has taken the prerequisites and can use relevant vocabulary drawn from lower-level courses, such as management and marketing.

In all essays, it is desirable for the introductory paragraph to engage the reader's interest and set the stage for rest of the essay. This personal anecdote accomplishes both.

Her early recollections are also relevant to the first catalog sentence, calling for the student to "understand the skills and motivation required for entrepreneurial success.

Whenever a student discusses learning that occurred during high school, it should be clear that the high school learning was at an introductory level, which was built upon in the adult years.

The section subtitle is drawn from the first two course objectives.

Drawing subtitles from objectives is the recommended way of organizing your essay in a very reader-friendly manner.

The student has followed the recommendation to work with a text and incorporate select quotes into her essay. The academic tone provides a good contrast to the more informal introductory paragraph.

The student was able to obtain the text listed on the syllabus through inter-library loan or from another student who had taken the course. If this had been difficult, another current college-level text could have been used. It is important to note that one of the two sources referenced here is a very current edition.

desire for immediate feedback, and ongoing reinforcement;

high level of energy, because hard work and long hours are the norm for start-ups:

future orientation, as entrepreneurs search for opportunities in the future; and

skill at organizing people and jobs to turn the vision into reality.

Additional entrepreneurial traits mentioned by William Bygrave include the following:

frugal with scarce resources

ability to maintain low overhead

ability to maintain high productivity

minimal ownership of capital assets

Another entrepreneurial trait not mentioned in either reference but true for me is the ability to recognize a problem or challenging opportunity and to solve that problem or challenge creatively. Finding an innovative solution to an existing problem is critical to the successful development of new product ideas.

With my early years grounded by entrepreneurship, it was natural that in 1987 my husband and I established a window and gutter cleaning business. We found out right away that there was no efficient way to clean gutters. We scoured the hardware stores and the janitorial catalogs and found lots of poorly engineered gutter cleaning aids, but none of the aids we found made the job easier or faster. This was our opportunity to find the solution ourselves, so we began developing, testing, and perfecting our own gutter cleaning tool between 1991 and 1994.

Product Development & Mold Making

The project began in our basement by building the tool prototype out of plastic, modeling clay, and paint. We took the prototype to a local mold maker and plastics expert and discussed our idea for the final product. We then began working with a company in the mid-west that specialized in making aluminum sand-cast molds. Although we knew that this type of mold had a limited production capacity, we chose the sand-cast mold because it was lowest in cost. We needed to determine whether the tool would sell before we invested in a higher quality, higher production steel mold.

The sand cast mold required many hours of finishing and polishing before it could be tested for the manufacturing. It also required machining both halves of the mold to ensure that they fit together correctly. These tasks were in the process of being completed when the company we originally worked with suddenly went out of business. At first we were very concerned because they had our mold in their possession when they went bankrupt. However, we were successful in retrieving it and proceeded to find another mold maker to complete the work required.

We worked with a local mold making company who completed the fabrication and machining on the mold. They also constructed the core that is required in order to

These comments make it clear that the student reflected on these lists after excerpting them. This is a good model of how to weave ideas from third persons (outside experts) and first person analysis.

This effective transitional sentence links the preceding information with the next topic.

This paragraph is written about activities carried out jointly by the writer and her husband. Since her husband is not applying for credit, it is important for the student to articulate the roles that she played in their partnership.

The writer uses clear descriptive language, walking the reader through the early stages of a business start-up.

This is one of many examples in which the student projects the impression that she is very conscientious and thorough.

create the threaded handle that the tool features. Additional machining on the mold was required the first time in order to add the name, The Gutter Cleaner on the front of the handle. Additional machining was required the second time in order to add the design patent number, 35893, in the relief area on the back of the handle, once the patent was issued.

Naming the Tool & Patenting Process

We had two Trademark Research Reports (see exhibits 1 & 2) prepared when we were naming the tool. One was done in 1991 and one in 1994. We finally decided, at the recommendation of our patent agent, that a generic name such as The Gutter Cleaner was our best option.

After several years of testing and development, and after researching the patenting process by reading books and articles on the subject, we contacted a local patent agent to facilitate our patent application. We began the patenting process for The Gutter Cleaner in early 1994. We received our design patent on July 4, 1995 (see exhibit 3). We considered this date a good omen, as it was Independence Day! One of our dreams was that our tool would become the best selling gutter cleaning tool on the national market.

Tool Appearance and Functionality

Business Plan

A business plan is a written summary of an entrepreneur's proposed business venture, its operational and financial details, its marketing opportunities and managers' skills and abilities. The components of a business plan include an executive summary, mission statement, company history, business and industry profile, business strategy, description of the product, the marketing strategy, competitor analysis, officer's/owners' resumes marketing strategy, plan of operation, financial data, and loan proposal, if appropriate.

I was able to utilize what I'd learned from my various readings on business plans in early 1994 when we began preparing our business plan (see exhibit 4). Although we did not intend to seek outside financing, we knew that a business plan is basically a road map for the future of the business and saw the importance of determining where our business was headed. The business plan was last updated in late 1997 (see exhibit 5).

If we require outside financing for our business in the future, we would prepare to present the business plan to a private investor or to the bank for consideration. When asking for financing, it is critical that the borrower be prepared, knowledgeable, concise, and enthusiastic. Additionally, follow-up with each investor is critical for funding consideration.

We also prepared to begin business by purchasing a computer and the necessary software required, and began setting it up for the business. We purchased Quickbooks for accounting purposes and, after setting it up, began using it for both businesses. We began by designing our own logo and then ordered printed letterhead and envelopes, business cards, and printed invoices (see exhibits 6-9), boxes for mailing wholesale orders, and padded envelopes for mailing retail orders. We set up a separate business account, and

She has appropriately created a context for the reader to understand the meaning of the exhibits (documentation) included at the end of the challenge.

Once again the student has been clear about how she learned (an outside expert in the field) in addition to what she learned.

This section is outstanding because testing, researching and reading are hallmarks of college-level learning. This balances the hands-on, trial-and-error learning in the essay.

(The copy has been omitted for this section because it did not add much to the course challenge. CPL students sometimes spend too much emphasis on describing at the expense of insufficient analysis.)

The syllabus indicated that the major assignment for the class was a business plan, to include the standard parts expected by financial institutions

The student realized that the business plan that she had written met these criteria and would likely be considered strong documentation. To be cautious, she also included this fairly thorough description of the role of the business plan. This discussion works in concert with the documentation rather than duplicating information.

In this challenge the student refers several times to the usefulness of her various readings. This desirable approach could be even stronger if she elaborated with examples of which concepts were useful and how they were applied.

It is healthy to discuss the advantages of options not taken.

established Visa and MasterCard agreements with Bank of America, paying a higher percentage as a new small business.

Forms of Ownership

According to Norman Scarborough and Thomas Zimmerer, there are a number of ways to set up business ownership. These include a:

Sole proprietorship, where there is unlimited personal liability, a limited skill set, feelings of isolation, limited access to capital, and a potential lack of continuity if the owner dies;

Partnership, which is easy to establish; where two or more co-own a business and work with a partnership agreement; owners have complementary skills; agree to divide the profits; have greater access to capital; experience little governmental regulation; have greater flexibility; and the partnership is not subject to federal taxation.

Corporation, where there is limited liability of the stockholders; greater ability to attract capital; ability for indefinite continuation;

S Corporation, which retains all advantages of a regular corporation, but passes all profits or losses through to the individual shareholders income and is taxed once at the individual tax rate.

We began by applying for a business name Rain City Tool Designs as a partnership. We originally intended to incorporate the business within 5 years, as we planned on expanding the business to design, manufacture, and market an entire line of gutter products, since we had lots of great ideas that just required development.

Beginning as a partnership was a well-researched and conscious decision. In making that decision we considered the control issues, the exposure to personal liability, tax factors and potential administrative costs. We recognized the risk that is inherent in blending marriage with business, but since we work well together and have complementary skills, we thought that a partnership was the most appropriate mode of ownership for us to begin with. The partnership allowed us both to be active participants in the day-to-day business functions and decision-making.

Marketing and Advertising

Marketing is the process of creating and delivering the desired goods and services to the customer and involves all activities that are associated with winning and retaining loyal customers. An effective marketing plan focuses on the customer and should accomplish the following four objectives:

determine customer needs and wants through market research;

pinpoint the specific target markets the small company will serve;

analyze the firm's competitive advantages and build a marketing strategy around them; and

When this portfolio writer analyzed the course objectives, she realized her understanding of different types of ownership was uneven.

She was conversant about partnerships, the type of ownership that she and her husband had selected, but vague about the other alternatives. To fill in the gap in her knowledge, she excerpted from the text. This approach is strong, but not ideal. Rather than excerpting so many definitions, she might have demonstrated the depth of her understanding by comparing and contrasting different forms of ownership in her own language

A strong example of analysis applied to decision-making. The student is clearly a reflective learner.

create a marketing mix that meets customer needs and wants.

I was able to apply what I'd learned from the books and magazines I'd read on marketing topics when we began developing our marketing and advertising strategies. First, we researched and identified our target market. There are lots of advertising possibilities for the small business including newspapers, magazines, catalogs, radio, television, direct mail, billboards, directories, transit ads, internet, trade shows, special events and promotions, and point of purchase ads.

Our first target market was the professional window cleaner. We began by advertising in The American Window Cleaner (see exhibit 10), which is an international professional publication and association, of which we are members. We designed our own advertising and purchased a 1/6-page ad for \$250.00 (see exhibit 11). We advertised in the magazine monthly during 1995 and 1996. We knew the ad was successful because, at first, the response was great. Over time the response to the ad declined, primarily due to the limited professional market. There were months where we covered the cost of the ad and many months when we didn't. We decided after two years of advertisements where many issues didn't pay for themselves that we needed to try something else.

Although we haven't advertised in this publication for some time, we still get calls from new customers who have seen our tool advertisement in The American Window Cleaner.

We also worked with the Small Business Administration (SBA) for several years. I attended Phase 1 of their Small Business Management Certificate Program from September, 1995 through April, 1996, graduating in May, 1996 (see exhibit 12) but found that they were teaching the me material I had learned in my own research efforts. Consequently, I decided not to pursue Phase 2 of their program.

Product Packaging

Financial Planning and Cash Budgeting

Norman Scarborough and Thomas Zimmerer stated cash is a four-letter word that is a curse for many small businesses. Neglecting the principles of cash management is not something an entrepreneur can do if he or she expects success. Developing a cash forecast is essential and constant monitoring of the cash flow is critical. It is possible for a business to earn a profit and still go out of business by running out of cash.

Rain City Tool Designs has been fully funded from personal funds and there are no plans to seek any funding from outside sources. Although it has never made a huge profit, cash flow is monitored regularly, and the business operates in the black. The largest cash requirement is to fund the manufacture of additional stock. However, since we still have approximately 2,000 of our last order of 5,000 tools on hand, we won't need to manufacture more tools for some time.

She refers to herself in the first person when referring to her reading. It would also be helpful if she also defined which of skills she personally used in the marketing arena. For example, did she do the initial design for the business cards?

One page has been omitted here, which discusses experience with direct mail, trade show, video, and the Internet. The reference to the emerging role of the Internet shows that her approach is contemporary. If a student was writing a challenge for this course on business activity that took place 20 years ago, he or she might need to spend a few hours getting updated on this critical area so that the content would not be outmoded.

She knows more about advertising than covered in the Entrepreneurship course. Therefore, she might explore removing some of this copy into a separate request for credit for Linfield's advertising course.

It is a strength that she attended a structured program that is widely recognized in the field, and that she includes the dates. If the qualifications of the instructor had been known, they would have been included.

A student might consider such a statement as "boasting." However, it is important to "blow your own horn."

(section omitted because of space limitations)

This section provides a good example of how a student can discuss confidential matters effectively without revealing details that may be uncomfortable. Students may also ask that confidential material be removed before a portfolio is used for training new CPL students.

Pricing

Operational Planning

Most businesses that have several employees require an organizational chart identifying key positions and the personnel occupying those positions. However, because we are so small, we still don't require an organizational chart. When we began the business we determined that together we would share the responsibilities of the business until we grew to the point that we needed additional help. We have continued to share equally in all of the business-related responsibilities, as the business has not grown as we had planned.

We will own and operate Rain City Tool Designs, but the initial enthusiasm has dwindled, and we are currently trying to either sell or license the patent.'

After working day and night for several years and not seeing the return we expected, we began to lose interest in the continued pursuit of this venture. Earlier this year, we were very close to working out an arrangement with Working Products, the company that manufactures the Gutter Getter, a tool that is very complementary to The Gutter Cleaner, when the two were used together. However, the deal didn't work out.

Since then we have been working with a company whose mission is to market ideas and patented products to manufacturers to determine if they are interested (see exhibits 15 & 16). So far, there has been limited interest, but not offers.

Owning and operating Rain City Tool Designs has been a real education. We began the educational process on day one, far before Rain City Tool Design was established by developing, testing, and patenting The Gutter Cleaner. Manufacturing, machining, and finishing the mold added to the learning process. Developing and refining the business and marketing plans were another valuable part of the learning process. Establishing and running the business enhanced the educational process. The first hand experience of trade show involvement was an exhausting part of the educational process.

We have found that every step of this business has offered us the chance to learn, to grow, and to continually challenge ourselves.

Rain City Tool Designs hasn't provided us a solid income or been the huge, national and international success we dreamed of, but we have gotten a real and valuable education along the way. Therefore, I request the full three credits for Entrepreneurship.

References

Bygrave, William D. The Portable MBA in Entrepreneurship. Canada: John Wiley & Sons, Inc., 1994.

Zimmerer, Thomas W. and Norman M. Scarborough. Essentials of Entrepreneurship and Small Business Management. Upper Saddle River: Prentice-Hall, Inc., 1998

(section omitted because of space limitations)

Her recognition of the needs of a business of a different size than her own demonstrates that she can apply her knowledge to a variety of different situations- another hallmark of college-level learning.

Another example of where it would have been useful for her to specify the skills that she personally used, rather than always speaking as "we."

The financial success of the business has no bearing on the outcome of the evaluation.

This provides a helpful summary of her case that she deserves the credit and has covered the full range of topics required in the course.

The concluding paragraphs nicely reviews what she learned as a result of her business experience.

The evaluator agreed, and granted the full 3 credits, noting that the student's expertise surpassed that of students who had taken the class. A job well done.

Linfield College Online and Continuing Education

I, _____,
Instructor Name

certify that _____ has
Student Name

successfully completed IDST 250 and has produced a portfolio with the required elements.

Signature

Date