SVQ Awards
E-Verification of E-Portfolios Case Study
JHP Training Scotland

Introduction

From 2008-2010, SQA worked with centres and External Verifiers (EVs) to pilot e-verification. This project was initiated because we were aware that centres and candidates were increasingly using e-portfolios and other electronic means to manage assessment evidence and we wanted to explore how SQA could make use of e-verification as part of its quality enhancement process.

As part of this pilot, SVQ awards in Customer Service at levels 2 and 3, delivered by JHP Training Scotland using their in-house e-portfolio *e-track*, were e-verified.

There are two sections to this Case Study. Section 1 is about introducing e-portfolios; Section 2 deals with e-verification of an e-portfolio.

The SVQs in Customer Service

The SVQs in Customer Service are intended for people whose job role involves dealing with customers, whether internal or external to their organization. These people may be working as sales people, administrators, hotel and travel employees, managers, in fact in any role that involves working with other people.

Candidates require skills and knowledge in understanding service requirements, anticipating customers' needs, meeting and exceeding customers' expectations and recognizing customer behaviours.

The SVQs are designed to be assessed in the workplace, or in conditions of the workplace.

JHP Training Scotland

JHP Training Scotland is part of the JHP Group which provides vocational qualifications and training across Scotland, currently with over 1400 Trainees.

JHP Training Regional Office in Motherwell offers Modern Apprenticeships and SVQs in a number of employment areas.

Drivers for e-portfolios

Greig Renwick of JHP Training notes the following as drivers for the introduction of e-portfolios into the organisation: the storage and security of paper portfolios; improved completion rates amongst learners; staff IT skills; and above all, the fact that in the 21st century we should be using 21st century assessing.

Advantages of e-portfolios

The main advantage is the eradication of large, cumbersome portfolios and the reduction of paper from an environmental point of view. The chances of paper evidence going missing or being damaged are also reduced.

Learners can access their work 24/7 on a secure portal and e-mail their assessor at any time between visits. Learners can add evidence as they go when at work or at home, and this evidence can be judged by the assessor and feedback sent to the learner.

Staff find the use of e-portfolios more streamlined and caseload management is easier and more transparent from a management and internal verifier point of view.

The use of e-portfolios supports remote or e-verification, both by internal and External Verifiers.

Assessors can reduce travel time since communication with learners by e-mail can be as frequent as required. This leads to a reduction in carbon footprint by assessors as well as internal and External Verifiers.

Observations are completed in the workplace as normal, however voice recorders via the telephone can be used for discussions, questioning and also for testimonies from busy managers. These recordings can be included in the e-portfolio.

Challenges in introducing e-portfolios

The main challenge for assessing staff was the transition from paper-based portfolios.

A full length training programme on the new system and its uses was created for all training staff. Technology training days were arranged throughout the business on the use of the new technology, including web-based software and the use of digital media such as audio recorders. Training in the use of voice recorders includes any data protection issues.

A complete set of resources for staff, learners and Verifiers (both internal and External) was written. These included training manuals and guides on how to use the system for all groups of users.

SQA

SVQ

Quality assurance

Quality assurance improves with the introduction of an e-portfolio. This is partly because the e-portfolio is set out in line with the assessment cycle which simplifies the flow of the audit trail for IV and EV purposes.

Other quality assurance points include:

- Internal verifiers can monitor more often if needed

- Advance planning by internal verifiers is easier

- Remote access is available to assessors

- The audit trail of the assessment cycle is clearer

- Remote external verification is possible

- The use of e-portfolios leads to an increased use of e-assessment

- Employers are more engaged in the education process.

Advice to centres about introducing e-portfolios

The main advice would be to identify the skills of existing staff and use these to create a suitable training programme before introducing e-portfolios.

A change in thinking is also required. Do not 'think in paper' – digital recording can be used instead of photocopying and writing out reports to collect statements and testimonies as well as to signpost evidence. The aim is not to produce an electronic paper portfolio, rather a new portfolio system meeting strict SVQ assessment guidelines.

A change in culture is required to allow staff to think differently than they may have before and also allow for more innovative ideas to form and enhance the assessment practice.

A good ICT equipment base is also required to allow each assessor to have a laptop to use as required and other assessor tools such as a scanner and a digital voice recorder.

Greig Renwick recognises other benefits of e-portfolios and *e-track.*

"**As the portfolios are web-based, learners and their work managers can access at work, in our centre or at home or even in an internet café if need be. The learner's manager at work is given a login, so can view progress and incorporate any internal training programmes.**"

"**Our company holds a resource base online which all learners can access if required via their own portfolio. Our 'Learning Library' is available at all times and added to on a weekly basis ensuring learners get the most up-to-date resources.**"

Planning for the e-verification

The External Verifier who carried out this e-verification noted that the verification was arranged as normal and that communication with the centre was by telephone and email. Although no 'visit' was necessary – the EV carried out the verification from his home – the 'event' was still arranged to take place on an agreed date, with someone from the centre being available on the telephone if necessary.

The EV had used *e-track* on previous visits and had been given training on the system. He had also been issued with an EV user guide, which he found to be comprehensive and easy to understand. JHP Training provided him with a username and password to access the system.

Carrying out the e-verification

The External Verifier was able to access candidate evidence and records easily, saying:

> " **Assessment at this level is mainly by observation and most of the observations were by voice recording. The voice recordings were very clear and the candidates were given ample time to contribute. Additional evidence was provided by photographs, scanned images and word files. These were tracked in the same way as the observations, so were easily accessible."**

Although the EV was able to carry out the verification from home, this did not mean that he was entirely on his own. He made several telephone calls during the process and was also in email communication.

An initial problem accessing the system to begin the e-verification (because the URL did not take him to the correct part of the site) was easily overcome – the correct link was sent by email and this took him straight to the log-in page.

The EV phoned a candidate who was working on level 3. The candidate said that he was happy to be using *e-track*, and was also happy with the online support he was receiving.

He also spoke to an assessor by phone. They discussed the use of the e-portfolio and the impact on the assessment process. The assessor mentioned that candidates were happy to use an e-portfolio and that assessment has not been affected by the use of *e-track* since the assessment tools were all in use for previous recording methods. The use of an e-portfolio did not affect the assessment. He also said that staff in the centre are happy to work with the e-portfolio. They have been fully trained in the system and have a support desk in case of problems.

Providing feedback to the centre on the e-verification

As well as providing feedback on the External Verification Report, the EV also gave feedback over the phone; a method which he says was satisfactory to both parties.

> **"I think telephone feedback is the best method; it is an easier way to get a two-way conversation."**

Conclusions

The EV had no problems with e-verification and added that travel time was saved by this method.

His recommendation is that e-verification should not be used for every verification event but only where the EV knows the centre, has worked with the system and is happy to carry out remote verification.

E-verification could be used in future where appropriate as an alternative to or to complement visiting verification and central verification.