

## Advice for Portfolio Study Groups

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### Activities to consider beginning with your first IPT course

- Consider any school project as a possible case study for your portfolio. Keep good notes about why you (or your team) made the decisions you made. Keep a copy of the Learning Goals Worksheet (from the [IPT Portfolio Guidelines](#)) handy to see how your project stacks up, and write down specific evidence for each line item.
- At the end of each class, keep all final copies of your projects safe on your own computer (not in Lotus Notes or a shared website).
- Keep classwork organized (for example, use separate folders for each class).
- Take the time to publish your school projects in *Performance Xpress* or *Performance Improvement*--your instructors would be happy to help you--it looks good for Learning Goal #10. You can also present your projects at local ISPI or ASTD chapter meetings, and the national conferences. Any projects you publish are likely going to be slam-dunk cases for a portfolio.

### Pre-defense semester activities

- Start thinking hard about the portfolio the semester prior to your defense.
- Download and read the [IPT Portfolio Guidelines](#) from the IPT website immediately.
- Find resources (e.g., articles, chapters) for each of the 32 tools and re-read them.
- Make sure you have a copy of the [HPT Model](#) readily accessible at all times.
- Read the [ISPI's Standards and Ethics](#) and determine how each applied to your case studies.
- Review your past courses and projects for work that demonstrates your knowledge of IPT.
- Review past projects to determine which of the 32 tools you used in each project.
- Identify 4-6 projects you think you could use for the portfolio. Narrow your selections to three based on quality, tools/theories used, and when combined, which ones show your "well rounded-ness" in IPT.
- Once you have your defense date, ask the IPT staff who will be on your review panel (it is subject to change). Review the professors' biographies to learn their specialties (e.g., the classes they teach, the papers they've written), and prepare answers for questions they may ask.

### **How to form a study group**

- A group of four is an ideal size.
- Find others you've worked well with before (consider past or current project teammates).
- Find others who have the same commitment to preparing for the portfolio defense as you do.
- Select a regular day/time to meet as a group that will consistently work for all involved.
- It may be helpful to live in the same time zone, but this is not required if everyone can be flexible.
- We used GoogleWave to share docs (it works better than GoogleDocs) and contribute to a wave at the same time (everyone can edit a wave simultaneously).

### **Deadlines and Milestones**

- When applying for a defense date, consider your school workload and outside commitments to determine if you should defend early in the semester or later. Work backwards from each person's defense date to set portfolio completion milestones for each person.
- Give fellow study group members two weeks to review first drafts of portfolios and provide feedback.
- For 1-2 weeks prior to a study group member's portfolio defense, devote all discussions to their practicing their oral defense.
- Have your 15 min. presentation completed before you turn in your portfolio, so there is no mis-match of information.
- Do not complete any of your deliverables at the last minute--there is no advantage to delaying the inevitable.

### **Study Group Timeline**

- Give a draft of each study group member's portfolio to each other 2-3 months prior to first person's defense.
- Schedule weekly calls to review and discuss the portfolios.
- Set deadline/milestone for preparing each study group member's 15 min. presentation.
- Schedule twice weekly calls to practice the presentation and defense.

## Portfolio Tips

- Include lessons learned, in writing, at the conclusion of each case study.
- Be very careful about which tools/theories you check off for each case study. You must have actively used the tool/theory at whatever point(s) you check off. Having used them as a "mental guide for your thinking" will not suffice.
- Consider including graphics in both your case studies and your oral presentation (providing partial evidence for [Learning Goal #8](#) ("Communicate effectively in written, verbal, and visual forms").
- Use all resources available to you (spell check, friends, co-workers) to ensure your case studies make sense and are grammatically correct.
- Thoroughly review the projects that your case studies are based on (for example, why did you/the project team choose that particular tool).

## Rehearsing the defense:

- GoToMeeting is available for study group meetings. Schedules times with Ron Grames (rgrames@boisestate.edu). Reserve times for your presentation rehearsals. Reserve a time if you plan to use GoToMeeting for your 15 min. presentation.
- Make a list of the materials you want to have "at your fingertips" during the actual portfolio defense, and have them ready for your rehearsals. You may need to post notes around your defense location.
- Practice your defense in the same location you will do your actual defense.
- Rehearse for the same amount of time as the defense will last, without taking a break. That means 60-90 minutes of continuous grilling from your study group members (including the 15 min. presentation—commence grilling immediately after, with no chit chat).
- Have fellow study group members act as other professors, with questions emphasizing the interests of your review panel (e.g., Winiecki = ethnographic stuff and EVIDENCE, Stepich = instructional design).
- Have one study group member be the "Russian judge" and ask really deep, probing questions. Group members should determine ways to fluster the individual being drilled, including interrupting his/her answer to ask another probing question or new question.
- When answering, describe the big picture and not the tiny details (unless asked). More forest, less trees.
- As a general rule of thumb, your answer should be concise and to the point (25 words or less).
- Provide evidence, not opinions.
- Try to always tie your answers to the bottom line--what do the results mean to your client and their stakeholders.
- Be able to answer questions about your decision-making process and line of thought/reasoning for using certain tools/theories.
- Be able to answer questions about tools/theories you could have used.
- For each case study, write out answers to the questions listed in the Portfolio Defense section of the [IPT Portfolio Guidelines](#) (page 7).

**Defense Location Tips**

- Ensure you have a quiet place, with no distractions. Send family, co-workers, pets, etc., away to guarantee no distractions.
- Ensure you have adequate, reliable phone, internet, or other connections.
- Use a headset to stay "hands-free"—try out your headset with your teammates, to ensure the sound is high-quality and consistently clear.

**Day-of-Defense Prep Tips**

- Be at your location at least 1/2 hour before your start time.
- Confirm that GoToMeeting (or any other web-based program you are using) is operational.
- Eat a regular-sized meal, and have water nearby.
- Do neck stretches and voice warm-ups to relax your vocal cords and neck—stress will make your shoulders creep up to your ears, and negatively affect your voice.