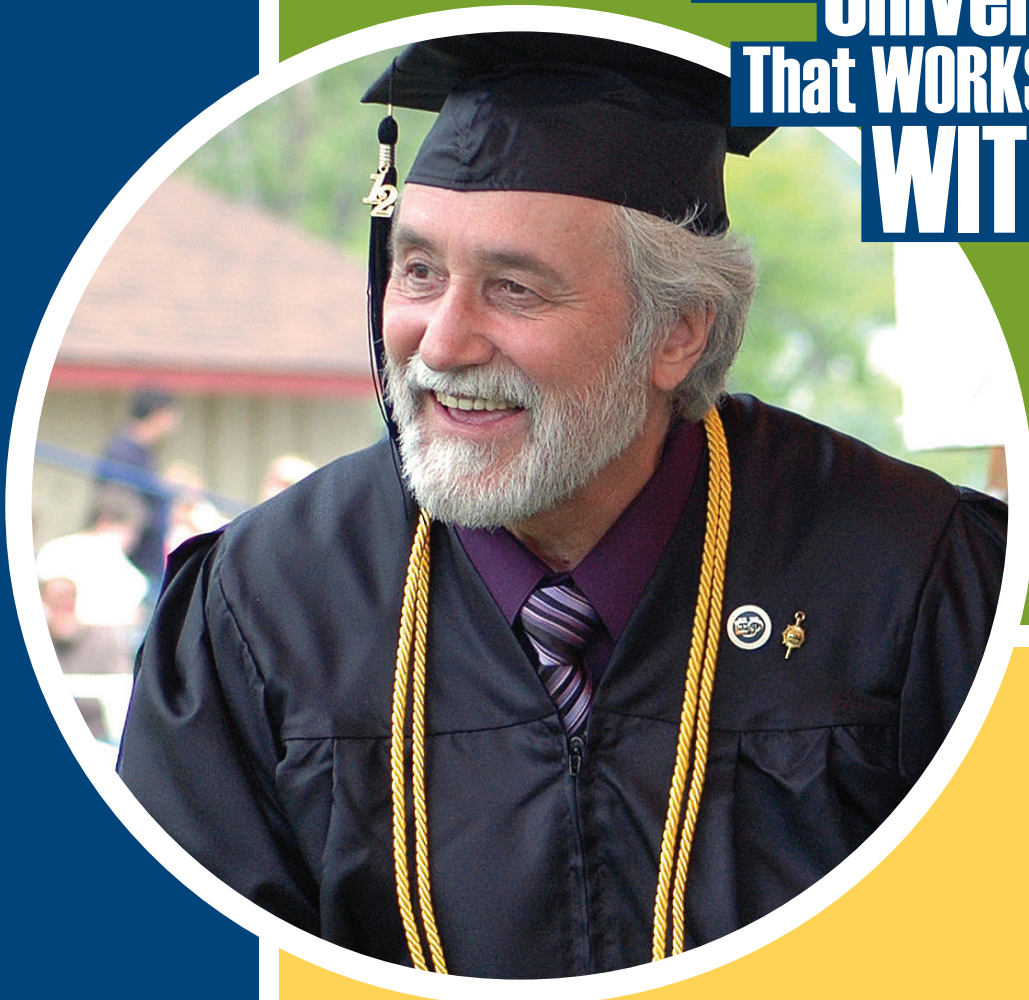


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## ASSESSMENT OF PRIOR EXPERIENTIAL LEARNING



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Eastern Oregon University belongs to the Council for Adult and Experiential Learning (CAEL), a non-profit, international organization. CAEL’s mission is to expand learning opportunities for adults. Founded in 1974 under the auspices of the Educational Training Service, (ETS) in Princeton, New Jersey, CAEL provides colleges and universities, corporations, labor unions, government, communities and philanthropic entities with the tools and strategies needed to create practical life learning solutions.

# 1- INTRODUCTION

This workbook is a tool for you to use in preparing your APEL Learning Essay Packet, commonly called a portfolio. A portfolio is the presentation of learning acquired through life/work experiences that is described, analyzed, and documented in a format that can be assessed for academic credit. Upon payment for these credits, they are transcribed and count toward the fulfillment of your college degree requirements.

Your portfolio can be used several ways:

1. Your portfolio can help you work toward a Baccalaureate of Science or Baccalaureate of Arts degree from Eastern Oregon University (EOU). In fact, the primary purpose of a portfolio is to satisfy part of your degree requirements by establishing credits for non-traditional learning, which free you from having to take courses in subjects you already know.
2. Your portfolio can help you work toward specific Eastern Oregon University Baccalaureate degrees by satisfying specific or elective course requirements of such programs. Consult with your academic advisor to see how portfolio work will fit in your program.
3. The discipline of compiling a portfolio can help you evaluate your prior learning and plot a future course with greater objectivity. The information may be used toward a professional portfolio in the future.

## COURSE OUTCOMES

The following statements describe, in general terms, the expectations for you in this course. More specific outcomes appear at the beginning of each chapter.

When you complete this course, you should be able to:

1. Clarify your educational goals
2. Understand the characteristics of college-level learning
3. Identify your prior learning experiences
4. Organize your prior learning into categories and match these categories of prior learning with college disciplines
5. Understand what experiences constitute creditable and non-creditable learning
6. Understand the differences between lower and upper division learning
7. Develop competency statements
8. Write a complete learning essay
9. Know what constitutes documentation
10. Prepare for assessment of your completed learning essays

## RESOURCES

To help you organize your learning from life/work experiences, EOU has made several resources available to you:

1. This workbook serves as a text and guidebook for this course. There is no other required textbook. It is recommended that you have access to a writing style guide. If you do not already have a style guide from another course, there is a recommended guide listed in the syllabus of this course.
2. The EOU Academic Catalog aids in identifying learning categories and in making credit requests.
3. Web resources will also be extremely useful when completing assignments and selecting the topic of your APEL essay. (See Section 10, Appendix B) Examples of sites include the following:
  - a. **Online syllabi** that give learning outcomes from EOU courses
  - b. **Faculty Expectations** written by academic faculty to assist students in focusing essays for specific disciplines
  - c. **Pierce Library** site, a resource for research
  - d. **EOU Writing Center**: <http://www.eou.edu/writing-center/student-resources/>
4. Your APEL 390 instructor is available to answer your questions either by e-mail, telephone, mail, or through personal contact. Your instructor is more than willing to consult with you about any concerns you may have.

The workbook will supply the general guidelines for organizing your learning. Your learning is unique. Assistance in applying the general guidelines to your needs will be furnished by your instructor and/or essay evaluator(s). They will make recommendations for refining and revising your assignments. These recommendations will contain pointers, directions, and suggestions to keep you on track. When you have questions or problems, contact your instructor.

## COURSE REQUIREMENTS

This is a college-level course from which you gain four upper-division quarter hours of credit. In order for you to receive credit for this course, you must:

1. Complete a narrative or autobiography
2. Complete an experience list
3. Submit a competency statement that fits your learning essay
4. Submit at least one essay compiled in your experiential learning essay packet.

One quarter hour of credit for a course taken on the EOU campus usually requires approximately 30 hours of combined instruction and student work. It is anticipated that your involvement in this course—whether by direct instruction in a regional course or by web interaction in an online course—will approximate that standard.

## CHAPTER FORMAT

Each lesson follows a similar format. In general, each lesson contains:

- A chapter introduction
- Chapter outcome (s)
- A short reading
- An assignment

**Chapter introduction:** The introduction is designed to give you a general overview of the topic.

**Chapter outcomes:** The outcome(s) appearing at the beginning of each chapter not only serve as a preview to guide your learning, but also serves as a review to help you determine how well you have mastered the material in the chapter.

**Reading material:** It is imperative that you study the reading material thoroughly and carefully. To help direct you in your study, boxes have been placed at the beginning of each reading assignment. These boxes contain questions that highlight important aspects of the reading—aspects that will help you understand items crucial to completion of the chapter assignments.

**Assignments:** Throughout the workbook there are assignments for you to complete which will be submitted to your instructor for review. These assignments are designed to help you gain the skill necessary to package your learning from life/work experiences.

### Assignments should be:

1. Typed, with your name at the top of each page
2. Double spaced

## HOW TO PROCEED

To help you master the material, the following general guidelines are provided:

**Step 1** - Familiarize yourself with the questions appearing in the box that precedes each chapter. Scan the chapter subheadings and main points. Then read the entire chapter contents both for overall clarity and to answer the questions posed.

**Step 2** - Complete the assignment that is part of each chapter.

**Step 3** - Submit your assignment to your instructor.

**Step 4** - Proceed to the next chapter.

There may be an inclination to take a shortcut and skip some of the steps and reading material. However, the readings have been carefully chosen to aid in your understanding of the total program. If you bypass steps or readings it may result in a lack of understanding when it comes time to complete the chapter assignment.

**Assignment – NARRATIVE/AUTOBIOGRAPHY/LIFE SUMMARY**

A **Narrative** will be your introduction to the faculty reader and will help you start thinking about important life and work experience that might have potential for generating college credit. It will help you identify prior learning experiences. The Narrative should give a brief description of your *post high school educational and occupational history*. You need to only disclose what you feel comfortable sharing; limited personal information is acceptable but extensive details are not appropriate. The Narrative should also include an explanation of your motivation for returning to college and your life and educational goals.

Answering these questions may help you write your Narrative:

1. What have been the significant events and interests in your life after high school (work, volunteer, service, travel, hobbies, etc.)? Be specific in your explanation.
2. Do you have previous college experience?
3. What were your areas of study?
4. Briefly, what are your educational and life goals? Why did you choose Eastern Oregon University and how will obtaining a college degree affect you?

*The Narrative should be brief (2-4 double-spaced pages).* This assignment is required for the APEL 390 course and will also be included in the completed APEL Learning Essay Packet to be submitted to the academic faculty reader. The same Narrative can be included with all APEL Learning Essays that you submit during the year ahead. You may choose to revise the Narrative at any time.



## 2 - WHAT IS EXPERIENTIAL LEARNING?

### INTRODUCTION

The concept of experiential learning and portfolio assessment of prior experiential learning may be new to you. Chances are you will come across at least some new and unfamiliar terminology and information that may be confusing to you at first. This is normal and expected. Don't despair. You are not alone. Your instructor is there to help you, and this workbook is a fine resource. As you proceed through this chapter and others, the concepts of experiential learning and how to record and document such learning will become clear. You are embarking on a great adventure.

### CHAPTER OUTCOMES

When you complete this chapter you will be able to:

Distinguish between traditional and experiential education.

### READ THIS BOX BEFORE YOU STUDY THE FOLLOWING READING MATERIAL.

Before you begin portfolio development you need to understand the rationale behind experiential learning and know how experiential education differs from college credit. The purpose of this reading is to help you begin this process.

As you read, consider these questions that will direct your reading:

1. What is experiential learning?
2. Why is experiential learning important?
3. What is one major difference between experiential and traditional education?



## BACKGROUND

Experiential education can be thought of as reverse learning. As young adults, many people enter the workforce without any traditional college classroom training. Their learning is acquired on the job through daily practice, decision-making, application, and infrequent errors (sometimes the best learning comes from making mistakes and devising the means to rectify them.) Often adults in the workplace may utilize similar theoretical approaches in their life/work to those taught in a classroom without being aware of it. Others read extensively and actively subscribe to some of the concepts that have proven valuable in situations like their own. The point is that some adults who have not had the luxury of a college education still receive a great deal of learning through experience.

Learning takes place in settings beyond the college campus. Through practice and application, adults constantly design and refine approaches to their life's work. They see methods that work and those that do not. The key to learning is adaptation and change. When we become stagnant, little new learning takes place. By actively taking part in daily home/work activities, adults can and do pursue a meaningful education. Modern educators have long recognized that experiential learning can play an important part in education.

But what and how much do you know? These are the questions that must be answered, and your portfolio will be your response.

## DIFFERENCES BETWEEN TRADITIONAL AND EXPERIENTIAL EDUCATION

Traditional and experiential education differs as this brief analysis shows:

### **Traditional education is based on the deductive process:**

1. Receiving information.
2. Assimilating and organizing the information as general principles are understood.
3. Inferring the application of these general principles in specific instances.
4. Applying the learning—taking action.

### **Experiential education is based on the inductive process:**

1. Observing and acting.
2. Understanding the effect of an action.
3. Understanding the general principles involved.
4. Applying these general principles to a new situation.

## Potential Problems with Processes of Learning

There are problems with both modes of learning.

The traditional mode is often weak in inferring applications and acting, steps 3 and 4 of the deductive process. **The typical complaint about traditionally educated students is**

that they may have done well on tests and examinations about general principles, but they are **weak when it comes to actual applications** of the information they have tried to assimilate and organize.

The **typical weakness of experientially educated** persons is centered in the third step of the inductive process...understanding underlying general principles. The common complaint is that they can “do” but **cannot “explain” and may have difficulty applying general theory to new circumstances.**

## **EXPERIENTIAL LEARNING - KOLB’S MODEL**

Researcher and organizational psychologist David Kolb asserts that **knowledge results from the interaction between theory and experience.** He states that learning takes place in four stages of a cycle that continues the more one learns. Experiential learning requires more than just having an experience. The cycle Kolb describes requires that a person is 1) involved in some activity, 2) critically reflects on the experience, 3) considers the abstract concepts and generalizations that apply, and 4) looks at implications for new situations. The cycle is repeated over and over.\*

For a schematic of the Kolb Model, see APEL Workbook Tab 10 – Appendix B: Resources that Assist APEL Students. Also you may use your internet browser to search the web using the key words of “Kolb’s Model”.

\*D.A. Kolb and R. Fry, *Toward an Applied Theory of Experiential Learning*, Cary Cooper, ed. Theories of Group Processes, Lond/News: John Wiley and Sons, 1975.

## **3 - IDENTIFYING PRIOR LEARNING EXPERIENCES**

### **INTRODUCTION**

Now that you have defined experiential education from a personal perspective, the next step in developing your APEL Learning Essay Packet is identifying your prior learning experiences. A learning experience is an activity in which you acquired or refined a body of knowledge, skills, or values. Often a series of minor experiences, when viewed collectively, make an important contribution to learning. Although you won't receive credit for these experiences per se, you may receive **credit for the learning** that resulted from these experiences.

### **CHAPTER OUTCOMES**

When you complete this chapter, you will be able to:

1. Discuss prior learning experiences that could generate college-level credit.
2. Identify experiences in your own background that have the potential of college-level credit by successfully completing an Experience List.

### **READ THIS BOX BEFORE YOU STUDY THE FOLLOWING READING MATERIAL.**

Many experiences that are a part of our lives have the potential for generating college credit. Now is the time for you to evaluate your own life and work experiences with that purpose in mind. The reading in this chapter can help you by suggesting possibilities for credit that can be applicable to your individual situation.

As you read, consider the following questions:

1. What three items distinguish college learning?
2. What specific categories or prior learning experiences apply to your own life/work? experiences?

## **COLLEGE-LEVEL LEARNING**

Learning is a constant process for most of us. However, much of that learning cannot be considered college-level. As you review your life experiences, you should consider **three characteristics that distinguish your learning as college-level.**

1. Your learning should **lend itself to evaluation.** You need to be able to demonstrate that you know or can do what you claim.
2. Your learning **should include both a theoretical and a practical** grasp of what you have learned. (This is a critical concept in the APEL process.)
3. Your learning should be **applicable outside the specific context in which it was learned,** or it should serve as a basis for further learning.

## **CATEGORIES OF PRIOR LEARNING EXPERIENCES**

Consider the following categories as you identify experiences that may be appropriate for college-level learning:

**Work** - Includes any paid activity that you carried out. (Includes military service.)

**Volunteer** - Experiences include non-paying internships or apprenticeships, community activities, political activities, church activities, service organizations, non-paying elective office(s) held, volunteer work in social service agencies, time contributed to supervising youth organizations, etc.

**Travel** - Includes 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 setting, etc.

**Recreational Activities and Hobbies** - Experiences include performing in a musical group, acting or working in a community theater, sports, artistic activities, nonfiction writing or public speaking.

**EXAMPLES TO CONSIDER**

- ❑ WHICH EXPERIENCES ARE COLLEGE-LEVEL PRIOR LEARNING EXPERIENCES?
- ❑ WHICH EXPERIENCES ARE NOT APPROPRIATE FOR COLLEGE-LEVEL PRIOR LEARNING EXPERIENCES?

**JIM** - Jim is forty-eight years old. Several years ago he lost his wife and two children in an automobile accident in which he was charged with negligent driving. Having come through this experience, he learned to live with his guilt by undergoing therapy, and has adjusted to his new lifestyle. He feels that the experience has taught him quite a bit about himself and other people.

He is presently the personnel manager of a local plant of a nationally recognized company that manufactures radios and television sets. He rose to his present position after eleven years in the personnel administration with his present company. He has written three articles for a professional journal in the field of personnel management.

For three of the eleven years that he has worked for his present company, he lived and worked in Brazil. While in Brazil, he traveled extensively in South America and feels that he has learned a considerable amount about cultural differences.

He has served as a lay leader and board member in his local church. He has read pertinent church literature and participated in an adult study group over a six-year period.

Jim now would like to go to college and pursue a Liberal Studies Degree. He feels that he should receive substantial credit for the learning that he has obtained outside of a formal learning setting.

**Probable Evaluation**

Jim may be able to earn college credit in the areas of personnel management, foreign language, speech communication, and professional writing. If he can demonstrate that the leadership and management skills developed as a result of his experience in a local church are generally applicable to other situations, he could receive some credit for what he has learned in that setting. Although the loss of his immediate family was undoubtedly a significant and traumatic experience, he will probably not be able to convey to others the insights that he gained about himself and other people, nor will he be able to demonstrate the applicability of the knowledge gained through that experience to other situations or settings.

**SHARON** – Sharon is thirty-eight years old. At the age of eighteen she entered the local community college and pursued a liberal arts program with no clear career objective. She received an AA degree at age twenty and married. Since then she has been a homemaker for herself, her husband, and two children. The children, a boy and a girl, are seventeen and fifteen years old, respectively. Through the time of rearing her children, she has read numerous books and articles on helping families and young people avoid alcohol and drug problems. The pediatrician and county mental health coordinator recommended many of the resources. She has provided community leadership with a local DARE program.

Her husband frequently comments on how much he values her companionship and support. He says that he could not have achieved the success in his career that he currently enjoys without her help.

Sharon participates in a number of civic organizations. She has been president of the PTA and vice-president of the local chapter of the League of Women Voters. In her spare time she enjoys playing and teaching tennis. She has worked extensively with a local women's shelter where she received training as a volunteer. She

regularly answers the community phone hot line and promotes the shelter's needs by serving on the local board of directors. She has read extensive material regarding the issues abused women face.

Sharon's children are growing up and she finds herself less content with homemaking. She is not sure what career, if any, she would like to pursue. She feels that enrolling in a bachelor's degree program will help her find an area of interest. She hopes her experiential learning will count toward the degree.

**Probable Evaluation**

Although rearing two children has been an important part of Sharon's life, she could not expect college credit for that activity alone. Since the college will likely not accept her husband's evaluation as being objective, she may not be able to demonstrate her competence as a marriage partner, even though this has been an important part of her life experience. It is possible that she may earn credit in organizational leadership, community service, gender issues, speech communication, and physical education/health.

**TED** – Ted is thirty-five, married and has three children. Since reading for and passing the appropriate state examinations, he has worked for seven years as a real estate salesman. He also worked his way through a self-instructional textbook in salesmanship. He has participated in three on-the-job training workshops totaling sixty contact hours.

Ted is a member of Toastmasters International and has given a number of speeches to service clubs. He is president of the local chapter of the Junior Chamber of Commerce and has served as president of the local chapter of the Lion's Club. He also serves as an elected member of the City Council.

For nine years Ted has read widely about photography during his leisure time. He presently owns \$2500 worth of basic equipment. He has won several awards at amateur photography showings and has had two "one-man" shows in his home community.

He has many friends in his home community and is considered by them to be an excellent host when entertaining at home.

Ted now wants to move up into a management position within his present real estate firm. Company policy requires that he have at least a Bachelor's degree in order to hold a management position. Ted wants to enter college to pursue a degree and feels that his past learning should count toward his goal.

**Probable Evaluation** - Ted may be able to receive college credit in the areas of business, photography, speech communication, and public speaking. His knowledge about child development is probably not at a college level. Also, his skill as a good host is probably not at college-level competency, nor does it have a theoretical base.

**BILL** – Bill is twenty-nine years old and single. Immediately upon graduating from high school, he joined the Air Force. While in the service, he assisted in running a post exchange. He feels that he learned a considerable amount about bookkeeping and inventory control while in the Air Force. For two years he was stationed in Germany.

For the past seven years Bill has operated a small gift shop, which he founded. He feels he has learned advertising and merchandising through his experience, reading and from taking non-credit seminars. He has traveled extensively in Europe to purchase items for his store. He knows French and German well enough to transact business in these languages. He has a superficial knowledge of three other languages. He feels he has learned quite a bit about cultural differences and some of the history of Europe.

Bill now wishes to pursue a Bachelor of Science in Business Administration. He feels that his learning should be recognized in meeting the requirements for this degree.

**Probable Evaluation-**Bill could receive credit for the subject areas of French and German, accounting, inventory control, speech communication, and small business management. His superficial knowledge of three other languages and of cultural differences and history will probably not be equivalent to college-level work unless supplemented by further study.



**Developing an Experience/Skill List**

This is a very important assignment as you will be identifying your adult life experiences and ultimately what you learned from those experiences. The Experience List that you develop will require extensive reflection. It will include 1) specific dates of your experiences, 2) the type of experiences, 3) what you actually did during the experiences, 4) what you learned, and 5) the academic subject field(s) at EOU in which your learning might apply. A sample format for the Experience List is as follows:

**EXPERIENCE LIST**

<b>Dates</b>	<b>Experience</b>	<b>What I Did</b>	<b>Skills I Learned</b>	<b>Academic Subject</b>

**See APEL Workbook Tab 12 – Appendix D for a sample of a completed Experience List.**

Some aids that may stimulate ideas for the wording you use in the “What I Did” and “What I Learned” sections of your Experience List include the following:

- Skills List Examples - The following categories are listed as examples of how jobs may be broken down into skills or roles:

**Counseling Skills** – Group counseling (list what types of problems), teaching (adults and/or children, volunteer or paid), inter-agency work, interviewing, writing programs, supervising clients, directing procedures, scheduling, formulating new ideas, keeping records, public relations, researcher, public speaking, money handling, writing reports, crisis work, other supervisory experience.

**Sales Skills** – Public relations, money handling, keeping records, greeting customers, customer service, order processing, bookkeeping, directing customers, inventory, displaying samples, demonstrating products, writing reports, experience in the art of persuading, servicing goods, supervisory experience.

**Secretarial Skills** - Receptionist, typing, filing, answering phones, stenography, transcription, making appointments, running office machines (list all you have had experience with), proofreading, clerking, sorting and delivering mail, getting clients, order processing, calling clients, directing clients, public speaking, keeping records, public relations, researcher, supervisory experience.

**Personnel Management Skills** - Selecting and/or recruiting individuals for a variety of jobs, establishing and maintaining procedures to monitor work quality and quantity, evaluating records of job performance, helping supervisors deal with personnel problems, conducting salary administrating and performance reviews for paid workers.

**Public Relations Skills** - Program development, news writing, writing feature stories and scripts for radio, television, preparing audio visual material, public speaking, interviewing, and disseminating information to individuals and groups outside the organization.



- **Bloom’s Taxonomy** - Please refer to APEL Workbook Tab 10 – Appendix B, Resources that assist APEL Students.

Benjamin Bloom, an educational psychologist and professor at the University of Chicago, developed a taxonomy that identifies critical thinking skills and how to identify among levels of thinking as they relate to the learning process.\* As you categorize specifics in the “What I Learned” column of your Experience List, consider the levels of Bloom’s taxonomy as they classify learning. This taxonomy may be an aid as you select wording that helps identify and accurately describe your learning.

<b>Assignment - EXPERIENCE LIST</b>
-------------------------------------

You are now ready to develop an Experience List. This is a very important assignment as you will be reflecting on the timeline and identification of your adult life experiences and ultimately what you have progressively learned from all those experiences.

To begin your Experience List, use the following headings:

- Dates of Experience
- Type of Experience
- What I Did
- What I Learned
- Academic Subject Area

In this assignment, list experiences—life, occupational, and non-credit educational—that have contributed to your personal and professional development and learning. **Experiences should be those that you think may generate college credit.** Do not include experiences that occurred before high school graduation or that have previously yielded college credit. When in doubt about an experience, list it—your instructor will advise you on questionable items. As you will later see, breaking your experiences into “What I Did” and “What I Learned” will serve as important parts of an outline for your learning essay.

**It is suggested that you wait to complete the final column of the Experience List that is titled Academic Subject Area until after you have read the next chapter in the APEL Workbook.**

The Experience List is an essential assignment for APEL 390, and the same list can be included in all APEL Learning Essay Packets that you submit. It is acceptable to amend the list as you progress if you think of additional experiences and learning that you would like to include.

\* Bloom, B. S., ed., et al. Taxonomy of Educational Objectives: Cognitive Domain. New York: David McKay Company, Inc., 1956.

## **4 - UNDERSTANDING COLLEGE-LEVEL LEARNING**

### **INTRODUCTION**

In the previous chapter you began to identify the sources of your experiential learning. Now comes the task of clarifying and classifying that learning. As you recall from the last chapter, you will receive **credit for learning**, which resulted from experience, not for the experience itself.

### **CHAPTER OUTCOMES**

When you complete this chapter, you will be able to:

1. Discuss those items that are considered creditable college learning and identify those items that apply to your own prior learning experiences.
2. Identify learning categories or subject areas corresponding to your life/work experiences so that you may complete your Experience List.
3. Distinguish between lower and upper division college credit.

### **READ THIS BOX BEFORE YOU STUDY THE FOLLOWING READING MATERIAL.**

As you read, consider the following questions which will help you complete your assignment that appears later in the chapter:

1. What is a college discipline?
2. What categories of creditable learning apply to your own life/work experiences? Give an example of each category that applies to you.
3. What constitutes lower division college credit? What constitutes upper division college credit?

## **CREDITABLE LEARNING**

Let's first look at what experiences constitute college-level learning. In addition to regular college courses at EOU, there are other options to demonstrate college level learning. For guidelines on the number of credits that you may obtain from each option, refer to the EOU Academic Catalog. Check with your academic advisor to obtain more detailed information on the following credit options:

### **1. College Transfer**

These are the credit courses, which were taken at an accredited institution and are listed on your transfer evaluation. Vocational or non-transfer community college credits will be evaluated with reference to your specific degree program and may also be approved for transfer.

### **2. Agency Sponsored Learning (ASL)**

Agency Sponsored Learning comes from training programs or courses conducted on a formal basis and with official approval of the sponsoring organization. These courses are from non-collegiate, non-degree granting institutions. Agency Sponsored Learning must meet the following criteria:

- a) Verification that learning took place; i.e. a measurable standard that the course, workshop, or training participants attain upon completion.
- b) Sufficient clock hours spent in the course, workshop, or training, using an estimate of 30 clock hours=1 quarter hour of credit.
- c) "Fit" of subject matter of the course, workshop, or training program into EOU's curricula.

### **3. Military Training**

Credit may also be obtained for completion of training schools and programs while in the military. Consult with your advisor about the appropriateness of this option as a means of fulfilling gaps in your degree program.

### **4. College Level Examination Program - CLEP**

CLEP, sponsored by the College Board, offers you the opportunity to obtain lower division college credit by examination. On-the-job experience, purposeful reading, adult school or correspondence courses, or television or taped courses may have prepared you to earn college credit. No matter where or how you have learned, you can take CLEP tests. If the result is acceptable to your college, you can receive credit. CLEP examination and related scoring information for EOU is available on the web at <http://www.eou.edu/registrar/files/2013/08/CLEP-Equivalencies.pdf>

### **5. Course Challenge**

Courses offered at EOU may be challenged if approved by the course instructor. If you feel you have the specific knowledge and skill, which would be learned in a course, you may challenge the course (see EOU's Academic Catalog for further information). The Course Challenge form is found under FORMS on the EOU Registrar's page.

### **6. Assessment of Prior Experiential Learning – APEL**

An EOU faculty reader of APEL essays has summarized the general philosophy regarding Assessment of Prior Experiential Learning as follows:

*“Life experiences are recognized as a legitimate and valuable learning process. While traditional classroom instruction in many cases is a more efficient and timely means of accomplishing learning, this method is clearly not the only way in which learning take place.*

*Portfolio essays are viewed as a potentially effective means of communicating to others the breadth and depth of knowledge one has gained about a particular subject within a discipline.”*

APEL can be further described as follows:

- a) Portfolio Assessment of Prior Experiential Learning is designed to assess individual life, work, and training experiences equivalent to college-level knowledge that could apply to a BA/BS in majors that are available at Eastern Oregon University.
- b) The rationale for granting credit for prior learning is that many adult learners probably have learning outcomes, which were not acquired through an accredited college. These outcomes may have been gained through life or work experience.
- c) The goal of the assessment procedure is to get at “knowledge.” Through the APEL process students earn credit for knowledge, and thus the questions are “What has been learned?” and “Does it fit within EOU’s curriculum?”
- d) If these learning outcomes fall within a discipline in the EOU curriculum and are deemed to be college level, they may be acceptable for credit at EOU and will be assessed through your portfolio.

## **COLLEGE DISCIPLINES**

College disciplines (i.e. Business, English, and History) identify the specific subjects taught at that institution. The terms “discipline,” “academic subject,” and “learning category” will be used interchangeably in this APEL Workbook. To identify the disciplines available in EOU’s curriculum, consult the EOU Academic Catalog.

## **UPPER AND LOWER DIVISION CREDIT**

In addition to knowing what constitutes creditable learning and college disciplines, it will be helpful to understand the different levels of learning. (The system of distinguishing levels of learning is called “taxonomy.”) The most basic division of college-level learning is between lower- and upper-division credits.

**Lower-division (LD)** courses are numbered 100-299 at EOU, and are generally taken in the first two years of college. Being **introductory in nature** and **covering basic principles** characterize this type of credit.

**Upper-division (UD)** credit is earned for those courses numbered from 300-499. Normally, prior study is required to take them. These courses reflect an **in-depth**, rather than an introductory study of an area, and the student is expected to exhibit **critical learning ability and application of basic principles**.

**Bloom’s Taxonomy indicates Levels of Learning:** As noted in the previous chapter, Benjamin Bloom, an educational psychologist, is credited with developing a taxonomy that identifies critical thinking skills and how to identify between levels of thinking as they relate to the learning process. \* The cognitive realm of this taxonomy gives a basis for assigning college course numbers and ultimately classification as either lower or upper division. The steps in Bloom’s Taxonomy are progressive with knowledge being the most elementary level of learning and progressively becoming a higher level as you go down the listing. (See more information on Bloom’s Taxonomy at Tab 10, Appendix B in this APEL Workbook.)

<b>Bloom’s Taxonomy</b>		
STEPS	College Course No.	Levels of Learning
Knowledge	100-199	Lower Division
Comprehension	200-299	
Application	300-399	Upper Division
Analysis	400-499	
Synthesis	500-599	Graduate*
Evaluation	600 +	
<p>* Though graduate level courses are not available for Assessment of Prior Experiential Learning at this time, you would be correct in requesting upper-division credit for portfolio essays, which demonstrate your learning at either a synthesis or evaluation level.</p>		

**Assignment – EXPERIENCE LIST: ADDING ACADEMIC SUBJECT AREA**

Review your Experience List exercise, paying close attention to the “What I Learned” column. Using college catalogs as a guide, categorize your prior learning into disciplines listed in EOU’s Academic Catalog, and fill in the column of your list entitled, “Academic Subject Area.” Try to be as specific as possible.

For example--

- Business: Entrepreneurship
- Speech: Interpersonal Communications

\* Bloom, B. S., ed., et al. Taxonomy of Educational Objectives: Cognitive Domain. New York: David McKay Company, Inc., 1956.

## **5- WRITING COMPETENCY STATEMENTS**

### **INTRODUCTION**

A **competency statement serves as a road map** to direct those who will be reading your essay. The competency statement communicates the nature and depth of your learning. It describes your ability to apply the essential principles and techniques of a particular area of experiential learning.

### **CHAPTER OUTCOMES**

When you complete this chapter you should be able to:

1. Discuss the five elements of a competency statement.
2. Write a competency statement from your own life/work experience.

**READ THIS BOX BEFORE YOU STUDY THE FOLLOWING READING MATERIAL.**

Competency statements are the beginning of the learning essay. Writing competency statements can be simple if you know the elements that comprise these statements and if you know certain key words and phrases to express yourself accurately and effectively. The reading that follows will help you write correct competency statements which will, in turn, serve as a good introduction to your essay.

As you read consider the following questions:

1. What are the five elements of a well-written competency statement?
2. What are two examples of words or phrases that can be used for each of the five elements of a competency statement?

**COMPETENCY STATEMENTS**

**Five Components of Competency Statements**

Before you begin to write a competency statement, it is helpful to think to yourself, “I know about this and I can do that, therefore, I have learned...” This line of reasoning covers two aspects of competency: the **(I) theoretical** (I know about) and the **(II) practical** (I can do).

There are three other components of a competency statement. Stating the **(III) subject area** such as Accounting, Literature, or Business is the third part of a competency statement and is something you learned in the previous chapter. The fourth aspect is how well you know and can do what you claim—your **(IV) level of achievement**. The final component is a brief description of the **(V) setting** in which learning occurred.

**PUTTING THE COMPONENTS TOGETHER**

Now that you have seen how all five elements of a competency statement work, let’s look at two examples. Note how all the elements combine to produce a concise, well-developed statement of learning, but do not necessarily have to follow the same order.

Component	Example
V. Setting	Having given three speeches at national conferences for the USDA Forest Service and multiple speeches as a city councilman for seven years
I. Theoretical	I know the concepts
II. Practical	and skills
III. Subject Area	for public speaking
IV. Level of Achievement	at a level equivalent to upper-division speech communication credit.

Component	Example
I. Theoretical	I know
II. Practical	and can apply the techniques
III. Subject Area	of management and finance
IV. Level of Achievement	well enough to develop a departmental budget for a school district,
V. Setting	having performed this service for the Union School District for the past two years.

**A GUIDE: STEPS IN WRITING COMPETENCY STATEMENTS**

1. III. Enter **Subject Area** in Column D.
2. I. Select one word from Column B to identify **Theoretical** aspect.
3. II. Select one word from Column C to identify **Practical** aspect.
4. IV. Identify **Level of Competence** by selecting one word from Column A and/or completing E, F, and/or G.
5. V. Add **Setting** in which learning occurred at the beginning of the statement.

# APEL

**Knows**

**A-IV.**  
 basic  
 intermediate  
 advanced

**B-I**  
 theory  
 history  
 concepts  
 principles  
 ideology  
 rules  
 beliefs  
 laws  
 relationships  
 vocabulary  
 generalizations  
 structure  
 classifications  
 systems  
 roles  
 patterns  
 etc.

**and**

**C-II**  
 methodology  
 techniques  
 methods  
 procedures  
 approaches  
 processes  
 treatments  
 skills  
 research techniques  
 functions  
 etc.

**of**

**D-III.**

**E**  
 well enough to

**F**  
 specifically

**G-IV**  
 at a level equivalent to

**and can**

**H-V**  
 apply            use  
 translate        interpret  
 determine       analyze  
 evaluate        relate  
 plan             compare  
 function as     write  
 etc.

\_\_\_\_\_ (enter description)

\_\_\_\_\_ (list specific theories, concepts, skills methods, etc.)

\_\_\_\_\_ (name reference group and level attained within that group)

\_\_\_\_\_ (enter description)

Adapted Courtesy of Metropolitan State University



**Assignment – COMPETENCY STATEMENTS**

Using your Experience List, construct three competency statements in three different subject areas. Each statement should contain all five components discussed in the reading.

NOTE: Your first Learning Essay Packet and all subsequent essay packets that you write will include only one Competency Statement. That statement should be specifically directed toward the learning essay topic.



## **6 – WRITING THE LEARNING ESSAY**

### **INTRODUCTION**

The work you have done to this point has prepared you for writing a learning essay. The essay and its accompanying documentation becomes the primary coursework that is evaluated when the evaluator makes a credit recommendation. You have the opportunity to earn college credit based on your ability to express and substantiate your learning experiences. Your portfolio is the means by which you incorporate:

1. **Theory**- what should be, has been and is effective.
2. **Practice** - what you did.
3. **Knowledge**- what you learned.

These three elements must appear throughout each and every learning essay. By following these guidelines, your experiential learning is more obvious to those faculty members at Eastern Oregon University who are assessing your credit potential.

### **LEARNING OUTCOMES**

When you complete this chapter, you should be able to:

1. Discuss the parts of a learning essay.
2. Write a learning essay that expresses theory, practice, and knowledge, and that avoids commonly made errors.
3. Make a credit request for a learning experience that includes the number of credits you are requesting, the subject area in which the request is made, whether the credit requested is lower or upper division, and whether you want the essay evaluated for meeting general education requirements.

### **READ THIS BOX BEFORE YOU STUDY THE FOLLOWING READING MATERIAL.**

Writing a learning essay can be a rewarding experience if you know and apply certain key points. Once you write your first essay, you will learn some effective strategies, and you will feel more confident in writing subsequent essays. The reading in this chapter has been prepared to teach you how to write the essay effectively and how to avoid some common errors that students make while presenting learning in essay form.

Consider the following questions as you read. They will help you in the preparation of future essays.

1. What are the three parts of a learning essay?
2. What is the most commonly made error in writing a learning essay?
3. What resources do you have to help you make credit requests and to identify if credit may meet general education requirements?

## **THE LEARNING ESSAY—KEY COMPONENTS**

A well-articulated learning essay should describe all aspects of your learning so that your prior experiences and your analysis of the subject can be evaluated fairly. See APEL Workbook Tab 12 – Appendix D for samples of all components of the APEL Learning Essay.

### **I. Component - Front page:**

Your learning essay should begin with a front page which identifies by academic discipline what learning is to be assessed.

### **II. Component - Competency Statement:**

The competency statement precedes the Learning Essay. The statement is focused on the topic you are addressing within the current essay you are writing. Be sure to include the five parts as explained in the previous chapter.

### **III. Component - Learning Essay:**

The learning essay section of the package gives you an opportunity to present to the faculty reader your knowledge and skill in a particular academic discipline. What you put forth here is the primary determinant of the credit requested.

#### **The learning essay should cover three major areas:**

1. A clear description of the **theory (ies)** which are generalizations or philosophical assumptions supported within the subject of the learning essay - Any references must be cited and expert opinions, past and/or present in the field need to be documented. (See information on Plagiarism later in this chapter). Your learning did not develop in a vacuum. You may not agree with all of the advice you see in print. However, a significant amount of theoretical examination must be present in your essay.
2. A concise account of the **practice** of your learning (the “**What I did**” component), including a portrayal of the circumstances in which your learning was acquired.
3. An **analysis** of the knowledge you acquired including an evaluation of your competencies (the “**What I learned**” component.)

One of the most frequently asked questions is, “How long does my essay need to be?” **There is no standard length for an essay.** Generally, the broader the essay topic, the longer the essay. For example, an essay covering Principles of Nutrition will usually be longer than one that discusses Nutrition for Diabetic Children. Writing style also influences length. Some individuals write succinctly, while others tend to use more words for explanation. Remember, when considering essay length, it is not how long the essay is, but rather how well you cover the topic to prove your case.

#### **CAUTION**

You may be tempted to write at great length about what was done rather than concentrating on what was learned. All too often, a learning essay becomes a narrative of an experience or an autobiography rather than an explanation of learning. Your essay should be clear and precise, describing your learning so that an expert in the area can tell you know your subject. Avoid the use of jargon and abbreviations that are associated with your own experience.

#### **IV. Component - Annotated Bibliography**

Although reading is never the sole basis for a credit request, it can be useful in organizing theoretical principles in writing a learning essay. Annotation of books, periodicals, or reviews should be presented in an abbreviated, paragraph form. The annotation in the bibliography should indicate where the author is “coming from,” where the author wants the reader “to land, and describe the reader’s personal responses to what he/she read.” The annotation should include your responses to the resource and not be just taken from the blurb on the book jacket. Check your Writing Style Guide or EOU’s Writing Center for information on proper citation of references. The Faculty Expectations written by faculty in the various disciplines may identify required citation styles (APA, MLA, etc.) for an essay written in their respective subject field. In the learning essay, referring to what you have learned through reading will link the theoretical to the practical and will likely provide strong support for your essay and credit request.

#### **V. Component - Credit Request**

After the learning essay, include your credit request. The credit request is similar to the competency statement; the main difference is that the credit request includes a statement about the amount of credit that you feel you deserve based on the comparability of your knowledge to that gained by students in similar courses.

At the end of your essay, make a credit request in which you identify the following:

1. the basic information from the competency statement including subject area, source of experience, level of achievement, setting, and what you know (theory) and can do (practical)
2. the number of credits you are requesting
3. the credits be evaluated as lower or upper division
4. if needed, the credit meets general education requirements in a specific general education category

Use any Oregon university catalog to aid you in requesting credit. If you can find a course offering that is similar to the learning category for which you have written your essay, you may want to use the number of credit hours suggested for that course as a guideline. However, do not use a course number in your credit request. For example, do not say, “*Considering my knowledge and skills, I request three lower division credits for SPCH 111.*” A course prefix number is indicative of a course taught in a traditional method. A better way of expressing this request is: “*Considering my knowledge and skills, I request three lower division credits for Interpersonal Communications.*” In the area of credit requests, use the catalog as a guidepost—not a hitching post.

Occasionally you select a special topic within a discipline and the faculty reader of that discipline gives approval prior to you initiating the essay development. If you find a course description and course credit notation for this specific topic in the catalog of another accredited institution, include a copy of that information as an addendum to your credit request.

Another suggestion in making a credit request is to estimate the clock hours you have spent in a certain experience. Beware, of assuming that unlimited application hours will yield unlimited credit. Each discipline has limits to credits awarded in subject areas. Your APEL instructor or academic advisor will be able to provide you with some guidelines in this area. Upper or lower division status is

entirely dependent upon the nature of the experience and the application/analysis or other higher-level critical thinking skills involved.

Examples of Credit requests include the following:

- Based on my demonstrated knowledge of the forms, styles, methods and process of preparation and presentation of public speeches for the La Grande City Council and at my employment for the State of Oregon, I am requesting three lower division credits in Speech Communication: Public Speaking. Please evaluate my essay to meet requirements for the General Education Core category of Gateway.
- In the above referenced essay, I have demonstrated a firm understanding of principles regarding marketing and sales as they apply in the real world. I request that through my demonstrated application of these principles in my years of experience at the Western Bank, Southwestern Oregon Community College, and Kid's Day Out that I be awarded five upper division credits in Business: Marketing and Sales

## **PLAGIARISM\***

Plagiarism is copying words from a book or magazine or imitating (paraphrasing) the language of someone else's work, failing to give credit to the source, and thus turning it in as your own. This form of stealing also includes using unacknowledged quotations. Thus, you will not avoid plagiarism by simply making a few changes or omitting a word here and there, by changing the order of words in a sentence, or by changing the order of sentences in a paragraph. Also, when you use words directly from a source, you must indicate so by the correct use of quotation marks.

All work must be your own, both on assignments and in learning essays, unless proper acknowledgement is made. Any evidence of copying from books, unacknowledged borrowing—including close paraphrasing—or of cheating could warrant the assignment of a failing grade, the forfeiture of all fees, and the denial of future service by this department.

\* Statement Adapted from the University of Oklahoma

## 6 -WRITING INSIGHTS for the LEARNING ESSAY

- **Important Web Sites to Check When Selecting Essay Topics and Writing Essays**

See APEL Workbook Tab 10 (Appendix B) for web site addresses of the following:

**EOU Faculty Expectations** – The faculty from various disciplines have written Faculty Expectations that will give you insight into successful essays written in specific subject areas. **READING** and **FOLLOWING** these directions will increase your potential for success. (Also see APEL Workbook Tab 11 – Appendix C)

**EOU Course Syllabi** – Syllabi from EOU courses will give learning outcomes from the courses. This information will aid you in identifying topics to cover within an essay for the respective subject.

**EOU Pierce Library** – The campus library has excellent resources for online students to use in researching topics.

**EOU Writing Center** provides writing resources as well as an opportunity for you to submit a draft online and receive feedback from a writing tutor. The link to the center is: <http://www.eou.edu/writing-center/student-resources/>.

**EOU General Education Requirements** – Explanation of general education categories and a listing of EOU courses that meet these requirements are available online. This information will aid you in deciding if there is potential for your essay topic to qualify for meeting a general education requirement.

- **Introduce your learning by stating the principles, methods, and theories that are the foundation for your experience.** If you have provided training for company employees, what educational principles underlie your presentations? Be sure to also relate the application of principles and methods to your responsibilities in the learning environment. It enhances your essay to state the impact the learning has had on your life and how you feel about what you have learned. If applicable, tell how the learning has affected your view of yourself and your view of the world. Citing the same training example, use the educational principles you have stated as a springboard to explain how your own training methods and strategies evolved, and why these practices are effective for you and your trainees.
- **When expressing your learning, use detailed illustrations.** For example, if you explain that from having worked with Al-Anon for five years, you have learned communication skills, elaborate on this concept. Explain what skills you learned, what helped you arrive at your learning, and how you applied this learning. You

might cite a sample case study that shows the communication skills you learned and how effective they were in performing your job. Examples help your evaluator see how you applied your learning. There is a tendency on the first essay to be too sketchy in explaining learning. Using examples and expanding learning statements can help overcome this difficulty.

- **Mistakes provide great learning opportunities** so do not hesitate to include a description of the errors you have made. Trying new ideas usually involves making mistakes. Many say that if you aren't making errors, you are likely too cautious and not innovative. Show how your errors were positive steps that helped you move forward. Give the details of how you learned from these situations. These examples can point out how being human means making mistakes. Frequently these situations even add humor. Sharing these experiences give an opportunity to prove that you have learned from the lessons of life!
  
- **Kolb's Model of Experiential Learning**,\* available in APEL Workbook Tab 10—Appendix B, can provide insight into articulating what you did, what you learned, what you concluded, and how you could apply your learning.
  
- **Bloom's Taxonomy**\*\* , available in APEL Workbook Tab 10—Appendix B, may assist as you consider the skills appropriate for the level of learning that you intend to prove to the faculty reader. Requests for upper division credit mandate that the higher levels of application, analysis, etc. are evident within the learning essay.
  
- **Samples**, available in APEL Workbook Tab 12—Appendix D, are available to give illustrations of the competency statement, learning essay, credit request, and annotated bibliographies that former APEL students have included in their APEL Essay Packets. These are included to give you insight but are certainly not all-inclusive as to appropriate creation of learning essays. Your individual “voice”, topic, experience, etc. should guide the development of your learning essay.

\* D.A. Kolb and R. Fry, “Toward an Applied Theory of Experiential Learning,” Cary Cooper, ed. Theories of Group Processes, Lond/News: John Wiley and Sons, 1975.

\*\*Bloom, B. S., ed., et al. Taxonomy of Educational Objectives: Cognitive Domain. New York: David McKay Company, Inc., 1956.

**ONE FINAL NOTE**

One other important element should be considered in essay writing—time management. Students most successful in completing their portfolios begin organizing and writing immediately. They commit themselves to a certain number of hours per week and establish a reasonable and workable schedule, taking into account other necessary responsibilities such as occupation and family. The old saying, “A job begun is a job half done,” has merit in this course. Many portfolio writers find it helpful to estimate the number of hours essay production will take and then set a deadline for completion. It usually takes longer to write than anticipated because of overlooking or underestimating “think time,” revising, editing, and responding to distractions such as phone calls. A schedule is one of the most vital components of portfolio completing. You have one year following the term of your enrollment in the workshop to submit your portfolio essays. See APEL Agreement for the exact deadline of when your year for essay submission ends.

**Assignment: THE LEARNING ESSAY**

Begin compiling the first draft of your learning essay.

- 1) Write a competency statement focused to the topic of your essay.
- 2) Produce an outline, an effective way to begin organizing your thoughts (See page 32/33. (The outline is not included in the finished packet.)
- 3) Develop a first draft of your essay. All professional writers are familiar with the reviewing and rewriting processes. Do not hesitate to request that others examine your work. We encourage you to use EOU’s Writing Center to submit a draft and receive the tutor’s review.
- 4) Write an annotated bibliography.
- 5) Develop a credit request.

This is obviously the major assignment of this APEL 390 course and will take a significant amount of quality time to complete. For your first Learning Essay, we suggest that you share your drafts of each of these segments with your APEL 390 instructor. Do remember that your instructor will provide you feedback on assignments and will be issuing an S/U grade for the four-credit APEL 390 course.

**Further credit for the APEL Learning Essay Packet when it is submitted to the academic faculty will be at the discretion of the faculty reader after his/her evaluation of the documents.**

We suggest continuing on with the next Chapter on Documentation even if all of the above assignment is not completed. Some documentation may require extended time to obtain.

**Remember that the key to a successful APEL essay is weaving the theory that you would have learned in a traditional classroom with the detailed illustrations of your experiences and discussion of what you learned from these experiences.**



**I. Introduction**

- A. **Purposes of Paper** – Using student’s *competency statement*, introduce intent to prove learned experience using the following theories.
- B. **Introduction of Academic Theories**
  - a. Theory I
  - b. Theory II
  - c. Theory III
- C. **Transition to Body**

**II. Body of Paper**

- A. **First Academic Theory (using citation[s])**
  - a. Practice (what you did – or experience)
  - b. What you learned (using theory & citations)
  - c. **2<sup>nd</sup> Practice (optional)** (*can be a contrast of the first practice or experience*)
  - d. What you learned (using theory & citations)
  - e. Did **Kolb’s Model** apply?
- B. **Second Academic Theory (using citation[s])**
  - a. **Practice** (what you did)
  - b. What you learned (using citations)
  - c. **2<sup>nd</sup> Practice (optional)** (*can be a contrast of the first practice or experience*)
  - d. What you learned (using citations)
  - e. Did Kolb’s Model apply?
- C. **Third Academic Theory (using citation[s])**
  - a. **Practice** (what you did)
  - b. What you learned (using citations)
  - f. **2<sup>nd</sup> Practice (optional)** (*can be a contrast of the first practice or experience*)
  - c. What you learned (using citations)
  - d. Did Kolb’s model apply in either

**III. Conclusion**

- A. Review Purpose, Theories – Restating Competency – Conclusion

**IV. Annotated Bibliography (includes a short review of each work)**

<b>**Check your work: Did you use <i>Kolb’s Model</i>? At what level are you writing?*</b>
--

**A SAMPLE of a student's essay outline****I. Introduction of essay**

- A. My management experience
- B. My management education

**II. Leadership**

- A. Theories and strategies learned
  - 1. Personal/team goal setting
  - 2. Motivation
  - 3. Stress in the workplace
- B. Using those theories and strategies in business

**III. Management Ethics**

- A. Towards employees

**IV. Conclusion**

- A. How to be an effective leader and motivator
- B. Organizing and setting goals
- C. Taking an ethical approach

**Probable sources:**

*Management, Tenth Edition.* Richard L. Daft

*Gung Ho! Turn on the People in any Organization.* Ken Blanchard

*The 7 Habits of Highly Effective People.* Stephen R. Covey

*Fish! A Remarkable Way to Boost Morale and Improve Results.* Stephen C. Lundin, Harry Paul, John Christianson

## **7 - DOCUMENTATION**

### **INTRODUCTION**

Now comes the time for providing evidence for your acquired learning. This evidence can serve several purposes in your portfolio. It can:

1. Verify or describe the experience in which the learning occurred
2. Describe the learning which occurred
3. Provide a measure or evaluation of how much and how well you have learned

In short, documentation helps to tell your faculty reader that you have experienced and learned those things that you claim in your essay.

### **CHAPTER OUTCOMES**

When you complete this chapter, you should be able to:

1. Identify appropriate types of documentation that apply to your learning experience.
2. Begin to obtain documentation that will accompany future learning essays.
3. Write a specific and effective letter of request for verification of prior learning.

### **READ THIS BOX BEFORE YOU STUDY THE FOLLOWING READING MATERIAL.**

Documentation can be one of the most important parts of your learning essay because it verifies that you have accomplished those things that you have described in your essay. Your evaluator will look very closely at your documentation before he/she recommends credit. This chapter will help you acquire the proper documentation to accompany your learning essay.

As you read, carefully consider the following questions:

1. What sort of items constitutes proper documentation for a learning essay?
2. What are three items that you will likely use to document future learning essays?
3. What are three important items that you should ask an employer or other person writing a letter of verification to highlight?
4. Where does documentation normally appear in the portfolio?

## Types of Documentation for Experiential Learning Activities

(Not only does documentation serve different functions, it also comes in many types.)

Type of Activity	Documentation
Work Experience	<ul style="list-style-type: none"> <li>• Job descriptions</li> <li>• Awards</li> <li>• Letters of commendation</li> <li>• Letters of recommendation from superiors, peers, clients</li> <li>• Congratulations on high performance</li> <li>• Promotion evaluations</li> <li>• Evidence of promotion</li> <li>• Samples of work produced</li> <li>• Evidence of suggestions adopted</li> <li>• Explanation of tasks performed</li> <li>• Explanation of ranking, rating, or classification system in company or organization</li> <li>• Scores on licensing exams</li> <li>• Licenses</li> <li>• Performance standards for acquiring licenses</li> <li>• Membership in professional or trade organizations</li> </ul>
Community Service	<ul style="list-style-type: none"> <li>• Commendations</li> <li>• Awards</li> <li>• Newspaper and magazine clippings</li> <li>• Letters of support/recommendation from co-volunteers, clients served, supervisors</li> </ul>
Non-Collegiate Courses and Training (when such did not yield credit via the Agency Sponsored Learning option)	<ul style="list-style-type: none"> <li>• Transcripts</li> <li>• Number of assignments completed</li> <li>• Total time spent on outside assignments</li> <li>• Letter attesting student was enrolled in course</li> <li>• Learning outcomes or objectives of course</li> <li>• Syllabi</li> <li>• Evidence of completion</li> <li>• Course description(s)/outline(s)</li> <li>• Number of didactic hours</li> <li>• Number of clinical or practicum hours</li> <li>• Diplomas</li> </ul>

Type of Experience	Documentation
Special Accomplishments	<ul style="list-style-type: none"> <li>• Books published</li> <li>• Pictures painted</li> <li>• Music written</li> <li>• A list of books read</li> <li>• Patents obtained</li> <li>• List of countries visited</li> <li>• Mementos from countries lived in and traveled to</li> <li>• Machines designed</li> <li>• Exhibits such as shells, plants, etc.</li> <li>• Photographs of famous landmarks visited</li> <li>• Speeches given</li> <li>• Programs from performances</li> <li>• Writing examples</li> <li>• Audiovisual presentations</li> <li>• Proposals written</li> <li>• Written summary, audio/video tape, or CD of conversations with experts</li> </ul>

**SUGGESTIONS FOR DOCUMENTATION**

1. Select applicable documentation for each essay.
2. If projects you would like to use for documentation are large or unwieldy (canvases, pottery, machinery, etc.) these may be photographed and incorporated as slides, prints, or compact disks. Whenever such items are submitted as exhibits outside the portfolio, they should be labeled, signed, and dated.
3. For clarity, significant parts of your documentation should be underlined or otherwise highlighted for emphasis.
4. You will need to provide verification of your participation in non-collegiate learning experiences such as company/professional courses, workshops, and other post-secondary, non-collegiate learning. In some cases, you may have a formal transcript; in others you may need to get letters from the instructor of the courses, your company, or the institution’s personnel department. Verification of the duration of the course and your participation in it will be considered minimal documentation. Your documentation will be enriched if you provide an outline of content, a bibliography, and an evaluation of your work.
5. After you have assembled all documentation you should review it fully, eliminating duplication or items that do not contribute specifically and directly to supporting your claim of learning.

6. In your learning essays, be sure to clearly refer to the documentation that supports your learning.
7. Documentation is appropriately placed at the back of the APEL Learning Essay Packet. This comes after the learning essay, credit request, and annotated bibliography.

**Note: The presentation of documentation does not relieve you from writing an essay that describes your learning.**

## **STUDENT GUIDELINES FOR ACQUIRING A LETTER OF VERIFICATION AND EVALUATION OF PRIOR LEARNING**

Letters are a common form of documentation. When requesting a letter of documentation, be as specific as possible. Responding to your request is an alien activity for most documenters. The more information you can provide, the clearer the response will be, and the more helpful it will be for your evaluator later on.

The following list is intended to help you acquire a satisfactory letter of verification and evaluation of your learning from a person capable of assessing your competence, skills, and/or knowledge.

1. The person preparing a written statement to verify and evaluate your experience should have **directly observed** you during the experience and not simply know about your experience second or third hand.
2. One person may verify and evaluate **more than one of your experiences**. The statement, however, should comment directly and clearly on each experience.
3. The letter should describe the learning experience and identify the college-level competencies acquired. In general, it should cover the points you have made in your learning essay about the knowledge gained through a particular learning experience. The writer should identify the activities he/she directly observed.
4. The person writing the letter of verification should identify his/her relationship to you (supervisor, peer, subordinate) as well as his/her qualifications for commenting on your experience.
5. The letter should be written on the official letterhead of the company, organization, or institution with which the author is associated. **The letter must be signed.**
6. The document should evaluate both the quality and quantity of the experience that you have had. It should state the extent and level of your learning.
7. Documentation will be considered to be public information. In other words, you should know (and, in the case of letter verification, advise the person providing this information

accordingly) that a number of individuals would look at the documentation that you have furnished.

8. Bring the above guidelines to the attention of the person writing the letter.

A sample letter of request for verification and evaluation follows.

**SAMPLE - LETTER OF REQUEST FOR VERIFICATION AND EVALUATION**

Return Address

Date

Dear \_\_\_\_\_:

As I discussed with you, I am a student at Eastern Oregon University and am working toward completion of my baccalaureate degree, using the Assessment of Prior Experiential Learning program as one option for degree completion. By documenting my ability in certain areas, you can assist me in obtaining this degree.

The categories I would like you to address are listed below. When addressing them, please emphasize wherever possible, that my knowledge was beyond a basic understanding of the area and had both theoretical and practical basis. This verification is necessary as I am trying to get upper-division credit for knowledge gained from my prior learning experiences. In order for upper-division credit to be assigned to an area, I must demonstrate that I understood concepts beyond an introductory level.

1. Organization Management: My organizational abilities in the typing lab need to be documented. This would include the organizing of students, supplies, materials, and details such as the multitude of different time tests necessary for all four levels of typing.
2. Records Management: The ability to “keep the books straight” would be documented here. This would include the transferring of files from active to inactive, being able to locate a returning student’s file quickly and easily, and the accurate recording of a student’s work.
3. Communication: This would entail my overall abilities in communicating with the instructors, with the students, and with the various people who enter the lab, including repair people.
4. Audio/Visual: Among the Business Education classes at Portland State University, there are classes on the advantages of audio/visual aids in the classroom. Since I have worked with audio/visual equipment and materials for nearly ten years, I greatly appreciate the advantages these aids present. My work in suggesting, devising, and using these aids would be documented under this category.
5. Personnel Management and Interviewing: The student lab assistants who have come and gone have sharpened my skills in managing personnel. Although I am not the “supervisor” of the lab assistant (since I do not actually hire them), as their “lead,” I am responsible for their training and for dealing with the day-to-day responsibilities of their work.
6. Techniques of Evaluation: Having been responsible for several evaluations of instructors as well as doing the evaluations for Co-op students working in the lab, several techniques of evaluation are known to me. Although I do not compile the evaluation statistics, the advantages of evaluation are familiar to me because of working with the instructor’s evaluations, filling out instructor’s evaluations myself as a student, filling out the Co-op evaluations, and being evaluated myself as an employee.

Some of the categories I’ve asked you to respond to will overlap with each other. Such also occurs, on occasion, for college classes. An overall, yet detailed picture of my abilities is what I will need for documentation. I will still need to take quite a few classes before I receive my degree; however, this particular prior learning program will enable me to obtain college credits in areas where I have obtained college-level knowledge through my employment. Your assistance in documenting my abilities will be very much appreciated.

Sincerely,



**SAMPLE - LETTER OF DOCUMENTATION***(OFFICIAL LETTERHEAD)*

Date

To Whom It May Concern:

This letter is written on behalf of \_\_\_\_\_. \_\_\_\_\_ is the business administrator of the \_\_\_\_\_, a group practice specializing in neurology in Vancouver, Washington. The practice is composed of three board-certified neurologists who provide neurological services to the community of Vancouver on both an inpatient and outpatient basis. The practice is a professional corporation with gross receipts of approximately \$1.5 million annually.

\_\_\_\_\_ has been with \_\_\_\_\_ since its beginning. She has been responsible for all phases of management of this professional corporation from its inception to its current level of development. The group was created in 1980. At that time, two neurologists purchased office space at their current site and made financial arrangements to furnish and remodel this space. The staff was hired, the practice was started, and it was continued since that time until the present, and it is expected to go on in to the future. In that period of time, the office has expanded both physically and in terms of professional staff so that now the professional corporation works with three neurologists and is directly involved in expanding with a fourth neurologist.

\_\_\_\_\_ has been the business, financial, and personnel manager of this venture from its inception to the present, and she is responsible for further planning as well. She was responsible for the negotiation of original loans and has continued to service these loans and make additional loans as necessary with the bank. She was responsible for hiring and planning office space and for overseeing the financial aspects of the purchase of furniture and finish work in the building. \_\_\_\_\_ was responsible for hiring staff until the present time where the professional corporation employees number 16-19 individuals.

\_\_\_\_\_ is responsible for the bookkeeping, including accounts receivable, accounts payable, payroll, tax payments and repayments of loans. She must also interface with the professional corporation's accountants and legal counsel so that the professional corporation's funds are managed in a fiscally sound manner. During this time, the practice has purchased and operated an in-house computer system for financial management, billing, and payroll. The billing aspects of this are especially complex as multiple third parties require specific forms and rituals for successful reimbursement. \_\_\_\_\_ was responsible for evaluating the different computer systems available for ultimate purchase and for training of personnel in its continued use.

She has been responsible for hiring, firing, training, and monitoring the functions of all personnel, which includes receptionists, clerks, record keeping and file personnel, practical nurses, and stenographers. She has also been responsible for engaging services on a part-time basis for related ventures. These responsibilities have required her to function in coordination with hospitals and other practices in the area. \_\_\_\_\_ was also responsible for the purchase of the telephone and communication system.

As business manager, \_\_\_\_\_ has multiple areas in which her communication skills are important. She must be aware of and able to reconcile problems arising out of functions of the office staff. She must be able to tailor certain office functions to the professional staff. She must be able to communicate with the professional staff to provide feedback as to developing potential problems in terms of patient satisfaction, satisfaction of referring physicians, and the satisfaction of third party payers. \_\_\_\_\_ must also be aware of

strategic changes in the community so that the professional staff and the practice itself remain alert to changing practice trends in both the community and potential competitive areas.

\_\_\_\_\_ has been responsible for establishing a record system for both a patient's medical problems and financial records as well. She has also been responsible for helping with decisions on purchase of major medical equipment.

At the present time, the medical practice is changing rapidly. The development of greater influence and power on the part of third party payers has begun to change the modes of medical practice and strategic planning as to expansion and pricing. Alliances with different practices, HMOs, and PPOs have become critical.

\_\_\_\_\_ has paid careful attention to all of these details and in doing so has accepted jobs as board and committee member of a variety of projects including Vancouver Medical Group Managers, Washington State Medical Group Managers Association, National State Medical Group Managers Association, Vancouver Chamber National Society of Human Resources, Secretary of the PTA of the Vancouver School District, and the American Cancer Society Reach to Recovery. She keeps informed and active in the community that makes strategic planning decisions. She has attended industry meetings, including some in Washington, D.C., where legislation involving these aspects of medical care and the business of medical care has been discussed.

The practice has successfully prospered since its onset and in our opinion, continues to have a bright future. Through all of this, \_\_\_\_\_ has maintained exceptionally cordial relationships with both the professional staff and the office staff as well as other practices, the banking community, the hospitals, and third party payers.

\_\_\_\_\_ experiences in this endeavor have been practical as well as theoretical, and anything I could say in terms of describing her success is belittled by the actual success of our venture. Thank you for your kind attention in this matter.

Sincerely,

*(Signature of Letter Writer)*

**Assignment: DOCUMENTATION FOR YOUR FIRST LEARNING ESSAY PACKET**

List the life experiences that you have discussed within your learning essay. Using the knowledge you have gained from reading this chapter, decide on the appropriate Documentation that you will need to prove to your faculty reader that you actually had these experiences. **Remember that Documentation that gives evidence of your competency and level of expertise may strengthen your request for credit.** Begin compiling this Documentation so that you will have it ready to incorporate in the binder at the time you submit your first Learning Essay Packet.



## 8 – COMPLETING THE PROCESS

### INTRODUCTION

You are now ready to submit your first APEL Learning Essay Packet (Portfolio) to complete this course. The packet should be sent to your APEL instructor for review. A course grade of S (satisfactory) or U (unsatisfactory) for APEL 390 will be sent to the Registrar at the end of the term.

At this point, your essay packet may be ready to submit for additional credit. As indicated in your APEL Agreement <http://www.eou.edu/apel/files/2012/11/APEL-Student-Agreement-form-2013-1fillable.pdf> you will be billed at the reduced tuition rate per credit hour.

You have one year from the end of the term in which you enrolled for APEL 390 to continue developing APEL Learning Essay Packets.

### CHAPTER OUTCOME

When you complete this chapter you will be able to complete the process so that final billing is paid and credits are added to your transcript.

### READ THIS BOX BEFORE YOU STUDY THE FOLLOWING READING MATERIAL.

Once you have submitted your first Learning Essay Packet, you will await return of the documents with the faculty reader's evaluation and credit recommendation. Your advisor will discuss the recommendation with you, and you will need to follow steps to conclude the process. Future Essay Packet submissions will be submitted directly to your advisor and otherwise follow the same format to the one used for the first submission.

As you read, consider these questions that will direct your reading:

1. What does the finished APEL Learning Essay Packet include?
2. What are your options, once you have received the faculty reader's evaluation?
3. When is the billing done for the Essay Packet?
4. What occurs after you finish your Essay Packet?
5. What are the procedures for submitting future Essay Packets?

**SUBMISSION AND EVALUATION OF LEARNING ESSAY PACKETS**

Each binder containing a Learning Essay Packet must contain the following components:

	<b>Component</b>
1	Title Page of Essay Packet
2	Table of Contents
3	Copy of College Transcripts <ul style="list-style-type: none"> <li>• EOU</li> <li>• Transfer Evaluation from other Institutions of Higher Education</li> </ul> Previous APEL Essay Evaluations (These documents give evidence to the faculty readers that there is no duplication between credits you're requesting and, in some cases, provide a lower division credit foundation with regular college credit for what you may be seeking at the upper-division level.)
4	Narrative/Life Summary
5	Experience List
6	Competency Statement
7	Learning Essay
8	Credit Request
9	Annotated Bibliography
10	Documentation

Please **do not insert portfolio pages into plastic cover sheets**. (Some documentation samples may be an exception.) Often faculty readers want to make written comments, and cover sheets act as a deterrent.

**Assignment: DOCUMENTATION OF YOUR FIRST LEARNING ESSAY**

Once you have completed the Learning Essay Packet, check with your APEL 390 instructor as to how the packet should be sent: 1) E-mailed to the instructor or 2) Placed in a binder with marked section dividers. **Always keep a copy of your essay packet in case it is lost through the mail or accidentally misplaced by a faculty reader.**

If, in the eyes of your APEL instructor, the essay is ready for review, he/she will pass the essay on to the Regional Operations Office to be forwarded to an Eastern Oregon University faculty member with the appropriate expertise to conduct the evaluation. Faculty evaluation is usually completed in two to three weeks. With the addition of tracking and mailing procedures, allow 6-8 weeks from the date you submit your essay to receive your credit recommendation.

If your essay is missing any of the required ten items above, your instructor will return your essay to you along with an explanation of the deficiency. Once corrected, you should resubmit the essay to your instructor for follow-up evaluation by faculty.

We want to emphasize the following guideline that is an accreditation requirement: Only the experts in the discipline are qualified to make a credit recommendation.\* Therefore, the APEL instructor can guide your development of the packet but the final credit recommendation is dependent on the judgment by the EOU academic faculty.

Whitaker, Urban, Assessing Learning – Standards, Principles, & Practices. Philadelphia: Council for Adult & Experiential Learning, 1989.

**APEL AGREEMENT**

You must also submit to your instructor a signed APEL Agreement before your essay can be sent to the academic faculty for evaluation. The Agreement can be downloaded from the web at <http://www.eou.edu/apel/files/2012/11/APEL-Student-Agreement-form-2013-1fillable.pdf> . This agreement provides the terms of payment for APEL credits and time line agreements for submission of future essays.

**AFTER YOUR ESSAY PACKET IS RETURNED FROM THE EVALUATION PROCESS**

Faculty readers will either accept your essay and recommend credit or will give an evaluation explaining why credit will not be awarded. Sometimes they will suggest revisions. You may make these revisions and re-submit the essay. For example, suppose you submit a Business essay requesting five upper division credits, and your faculty reader thinks that on the basis of your essay, you should only receive three credits. He/she may recommend the three credits, but suggest that if you submit additional information, you could gain the remaining two credits. Thus, the essay you submit may not be the final draft; you may make revisions in accordance with your faculty reader's suggestions.

Your advisor will return your Essay Packet along with the evaluation of the faculty reader. The faculty reader will have noted his/her recommendation for credit. The credit recommendation may be the same or different than your credit request. (Potentially it may be for more or less credits than requested or for lower division when you requested upper division.) You and your advisor need to discuss your acceptance of the recommendation.

**OPTIONS****A. If the credit recommendation is IDENTICAL to the Credit Request**

- The Regional Operations Office will initiate a process wherein the "recommendation" is converted to a "credit award". This involves approval from 1) the appropriate School Dean, which is dependent on the discipline of your essay topic, and 2) the Provost. You will receive a credit award and billing statement that is generated from EOU. Upon your payment to EOU for the amount of the invoice, the Registrar will enter the appropriate credit on your transcript. It would expedite the process if you would notify the Regional Operations Office (1-800-544-2195) when you have made this payment.

In most cases, upper division credit will be posted as APEL 499 and lower division credit will be posted as APEL 299 on your academic transcript. (Remember that the APEL Agreement, which you signed, is a commitment to pay for all credits you requested and that were awarded by the faculty reader. There has already been time expended and costs incurred when the faculty evaluated your essay.)

**B. If the credit award is DIFFERENT in any way from the Credit Request...**

- If the credit award is for **more credits** than you requested, your advisor will confer with you to be sure you want to accept all the credits awarded. You are only obligated to accept the number of credits you requested. The process will continue as noted in A above.
- If the credit recommendation is for **less credits than you requested**, for **lower division when you requested upper division**, or if there are **other differences**, you will need to discuss the situation with your academic advisor. You may choose to accept the credit recommendation of the faculty reader. If the faculty has suggested that alterations would be appropriate in order to potentially obtain a specified amount of credit, you may choose to edit your essay and/or make the necessary changes in the Essay Packet. After this is accomplished, resubmit the Essay Packet by sending it back to your advisor. The Essay Packet will be routed back through the Regional Operations Office and to the faculty reader. Once the evaluation of the faculty reader is accepted, the process will continue as noted in A above.

**\*Financial Note:** Though the tuition for the APEL workshop may be covered within your Financial Aid package, the Prior Experiential Learning credits awarded via the Essay Packet are not.

**ARE YOU READY TO WRITE YOUR NEXT ESSAY?**

The second and all subsequent essays follow the same basic format as you followed in submission of your first Essay Packet. You can insert the original Narrative/Life Summary and Experience List. Other sections of the Essay Packet will need to be developed for the new essay. Your documents should include an updated transcript in that all information must be current. Include an updated copy of your EOU transcript. The transcript from Webster is acceptable. Include any previous EOU Essay Packet evaluations to both confirm no duplication between what you are requesting and, in some cases, to provide a lower division credit foundation with regular college credit for what you may be seeking at the upper-division level with your essay.

The **second and all future Essay Packet submissions will be sent directly to your advisor** instead of being sent to the APEL 390 instructor. Before starting another Essay Packet, it is critical to confirm the essay topic with your advisor. By reviewing your degree completion plan, your advisor can assist you in determining the need for elective credit, upper or lower division credit, credit needs in your major, credits to meet general education or residency requirements, etc. This will affect both your credit request and the selected topic.

Refer to the APEL Agreement for the length of time that is allowed for writing APEL essays.

**Submission of essays must be done within one year following the term in which you were enrolled in the APEL 390 course.** An additional fee is charged if you wish to continue the process beyond that year. The fee allows you an additional year and permits you to retake the APEL 390 course (at no charge) so you will be current with any new APEL Learning Essay Packet criteria. If you fall out of “continuous enrollment” (see the Eastern Oregon University Academic Catalog for definition) you may have to meet any new graduation program requirements that have occurred.

## **AFTER ASSESSMENT OF PRIOR EXPERIENTIAL LEARNING, WHAT?**

Our experience has been that students who compiled all their completed essays into a final portfolio were able to use these documents during the job interview process. The Portfolio has impressed more than one future employer and has been credited with assisting the applicants in being hired.

## **IS THERE LIFE AFTER GRADUATION?**

The answer is a resounding “yes!” Not only will there be the possibility of job promotion or increased work opportunities with the achievement of a college degree, but you will have the self-satisfaction of knowing that you successfully completed this important phase of your life.

**Continued good luck and success to you!**





## **9 – APPENDIX A POLICY OF EASTERN OREGON UNIVERSITY ASSESSMENT OF PRIOR EXPERIENTIAL LEARNING**

### **I. GENERAL GUIDELINES FOR QUALITY ASSESSMENT**

Eastern Oregon University follows the standards and principles of good practice as outlined in the Council for Adult and Experiential Learning's publication titled Assessing Learning – Standards, Principles and Practices by Urban Whitaker (1989). Two categories are listed as follows:

**Academic Standards** – related to the assessment process itself

1. Credit should be awarded only for learning, and not for experience.
2. College credit should be awarded only for college-level learning.
3. Credit should be awarded only for learning that has a balance, appropriate to the subject, between theory and practical application.
4. Appropriate subject matter and academic experts must make the determination of competence levels and of credit awards.
5. Credit should be appropriate to the academic context in which it is accepted.

**Administrative Standards** - related to the context in which the assessment and award of credit take place

6. Credit awards and their transcript entries should be monitored to avoid giving credit twice for the same learning.
7. Policies and procedures applied to assessment, including provision for appeal, should be fully disclosed and prominently available.
8. Fees charged for assessment should be based on the services performed in the process and not determined by the amount of credit awarded.
9. All personnel involved in the assessment of learning should receive adequate training for the functions they perform, and there should be provision for their continued professional development.
10. Assessment programs should be regularly monitored, reviewed, evaluated, and revised as needed to reflect changes in the needs being served and in the state of the assessment arts.

### **II. RATIONALE**

The primary impetus for this policy was the creation of the External Degree (BA/BS) in General Studies at Eastern Oregon College in May 1978. This degree was approved by the State Board of Higher Education in recognition of the special needs of adults in the rural areas of the state. It was the major focus of efforts aimed at offering programs, which were packaged so that non-traditional students could participate in them, and obtain their baccalaureate degree. Since 1978, there have been many changes. The institution is Eastern Oregon University with APEL located under Regional

Operations administering the program directed toward adult students both in Oregon and throughout the United States and Canada.

Assessment of Prior Experiential Learning continues to be a necessary and relevant option for adult students receiving degrees at Eastern Oregon University. Such assessment provides recognition for non-traditional college-level learning. It may shorten the time needed to complete a degree, and involves the adult learner in a developmental process, which in itself has much value.

### **III. ELIGIBILITY**

Regularly admitted EOU degree-seeking students may enroll in APEL 390, Assessment of Prior Experiential Learning, which is the course in which the prior learning assessment process is taught. Students successfully completing this course may continue in the APEL process by developing Learning Essay Packets to be evaluated by the EOU academic faculty. (Students in approved collaborative programs with EOU may also be considered for APEL.) Students should have their advisor's approval to enroll in APEL.

Students who participate in this credit option should have experiences from their adult life that appear to have potential for college-level learning.

### **IV. ADMINISTRATION AND STAFFING**

- **Administration:** The Regional Operations Office will administer the APEL program, with the EOU Provost assuming administrative responsibility. A Director of Portfolio Assessment, under the supervision of the Provost, will oversee the policy and operations. Assurance of fair and consistent treatment of students will be part of the Director's role.
- **APEL 390 Instructors:** Instructors for the APEL 390 course will meet EOU instructional teaching criteria and be approved through either the College of Arts and Science or the College of Business and Education.
- **Faculty Readers:** Eastern Oregon University academic faculty from the disciplines represented at EOU will be selected as APEL faculty readers to evaluate Learning Essay Packets in topics of their respective disciplines. Faculty reader will make a credit recommendation. These faculty shall be approved by their respective School Dean and participate in appropriate sponsored training. Faculty readers will be paid a flat fee per essay evaluated.
- **Credit Award Signers:** Signers on the Credit Award will verify that adopted standards, policies, and procedures have been met. Two signatures will be required on the credit award: 1) the School Dean of the faculty reader (verifying the credentials of the faculty reader) and 2) the Provost (verifying the administrative standards, policies, and procedures).
- **APEL Policy and Procedure Reviewers:** A committee of selected EOU faculty readers, academic administrators, and APEL administrators will be activated on a bi-annual basis to review the policy and procedures of the APEL program. Their recommendations and adoptions will be made available in appropriate institutional publications.

## V. EOU POLICY

- **Fees** - APEL 390 is a four-credit upper-division course. The cost per credit will be the same as for other credits offered online. Cost per credit awarded from evaluation of APEL Learning Essay Packets will be identified online and in some EOU publications; Regional Operations or a Regional Office can also confirm current fees. The current cost per credit will be entered on the APEL Agreement that the student signs.
- **Credit Limitations** - Credit awarded for Learning Essay Packets is limited to 45 credits at an under graduate level. (In accordance with Northwest Association of Schools and Colleges accreditation, the 45 credits reflect a 25% maximum of the minimum credits required for an EOU Baccalaureate degree.) **Students are advised that APEL credit may not be transferable to other institutions.**
- **Degree Requirements met by APEL Credit** - Credit from essay assessment has the potential to meet elective, general education, or major/minor requirements within a student's EOU degree plan. The advisor attempts to guide a student to work on essays that would be focused on degree-completion gaps. Prior to the faculty reader's evaluation, there are no assurances as to the number of credits to be awarded, upper division determination as compared to lower division credit, or how credit will "fit" a degree plan. The credit awarded will ultimately be recorded by the Registrar on the student transcript as APEL 299 for lower division credit and APEL 499 for upper division credit.

## VI. PROCEDURES

1. The student obtains information from Regional Operations. Discussion with the academic advisor is strongly recommended.
2. The student enrolls in APEL 390, Portfolio Development, and satisfactorily completes the course. The outcomes of this course provide the following:
  - a. Guidelines as to definition of college-level learning.
  - b. An essay development process that ties learning from the prior experience to the theory of the relevant academic field. (Credit is awarded only for demonstrated college-level learning and not for the experience per se.)
  - c. The standards that are appropriate for performance in the various EOU disciplines as outlined in the individual Faculty Expectations submitted by faculty readers in the various disciplines.
3. The student submits the first Learning Essay Packet to the APEL Instructor and all future essays to his/her advisor. The packet is then forwarded to the Regional Operations Office for routing to the appropriate school and approved faculty reader with expertise in the essay topic.

4. An EOU academic faculty reader from the discipline of the essay topic evaluates the Learning Essay Packet and makes a credit recommendation. The reader verifies the following:
  - a. The documented learning would be expected to fall within the regular curricular offerings of Eastern Oregon University either as outcomes from regular courses or as special topics.
  - b. The learning is at college-level, comparable to credit earned by traditional means.
  - c. The documented learning ties the student's experience to the theories of the respective academic field.
  - d. Credit from APEL essays does not duplicate other credit that is on the student's transcript.
5. If the credit recommendation is identical to the credit request, the Regional Operations Office will initiate a process wherein the "recommendation" is converted to a "credit award." The credit award letter will document the number of credits awarded, the upper/lower division level determination, and (if applicable) meeting of any general education requirement. The credit award requires approval from the faculty reader's School Dean (verifying the expertise/qualifications of the faculty reader) and the Provost (verifying the processes of administrative policy and procedure.)
6. The student receives a credit award and billing statement that is generated from EOU.
7. If the credit recommendation varies from the request, the advisor and/or APEL instructor communicates with the student to determine if the credit recommendation will be accepted. In some situations the student may choose to amend the essay with the intent of resubmitting the essay for a second evaluation.
8. Upon receiving the billing statement, the student sends payment to EOU. If payment is not made punctually, the EOU accounts receivable will add the amount due to the student's account. If payment is sent directly to EOU Business Office, it is requested that the student also notify the Regional Operations Office that payment has been made.
9. Upon verification of payment, The Regional Operations Office will notify the Registrar who will post credit on the student's transcript. The transcript notation will designate that credit was awarded through Assessment of Prior Experiential Learning.
10. Appeals to the faculty reader's credit recommendation should be made within 30 days to the Director of Prior Experiential Learning. A final appeal may be made to the School Dean associated with the discipline of the essay; this process is comparable to that used when a student files a grade grievance.

## **VII. ADVISING FOLLOW-UP**

After receiving credit for prior learning, the student shall work with his/her advisor to update the degree completion plan. APEL credits may be used to meet some general education credits, elective credits or in a degree program when approved by faculty within that discipline.

## 10 – APPENDIX B RESOURCES THAT ASSIST APEL STUDENTS

### WEB RESOURCES

**APEL Syllabi** - <http://www.eou.edu/apel/apel-syllabus/>

- ❑ Syllabi of the APEL 390 courses at EOU

**APEL Faculty Expectations**- <http://www.eou.edu/apel/faculty/>

- ❑ Faculty Expectations – Written by academic faculty from the various EOU disciplines; gives insight into writing for specific subject fields

**Student Agreement Form** – [http://www.eou.edu/apel/files/201\\_Student-Agreement-form-2013-1fillable.pdf](http://www.eou.edu/apel/files/201_Student-Agreement-form-2013-1fillable.pdf) 2/11/APEL-

- ❑ APEL Agreement Form – Form that must be downloaded and sent to Regional Operations Office prior to submitting APEL Learning Essay Packet for evaluation by EOU Faculty

**EOU Academic Catalog** – <http://www.eou.edu/catalog/>

**Pierce Library** – <http://library.eou.edu/>

- ❑ EOU’s library that provides excellent research resources for students. Click on “Ask a Librarian.”

**EOU Writing Center**- <http://www.eou.edu/writing-center/student-resources/>

- ❑ Resource for submitting an online draft of your paper and receiving feedback from a tutor; also excellent resources for research citations and other writing references.

## Bloom's Taxonomy

Benjamin Bloom, an educational psychologist and professor at the University of Chicago, developed a taxonomy that **identifies critical thinking skills and how to identify among levels of thinking as they relate to the learning process**. Bloom identified six levels within the cognitive domain. The lowest level is knowledge, the basic recognition of facts and rote memory skills. The levels become increasingly complex and abstract, up to the highest level of evaluation.

We believe the following table of this model will be an aid as you select wording that helps identify and accurately describe your learning within your Experience List, Competency Statement, and Learning Essay. **Refer to page 22 for EOU's numbering system.**

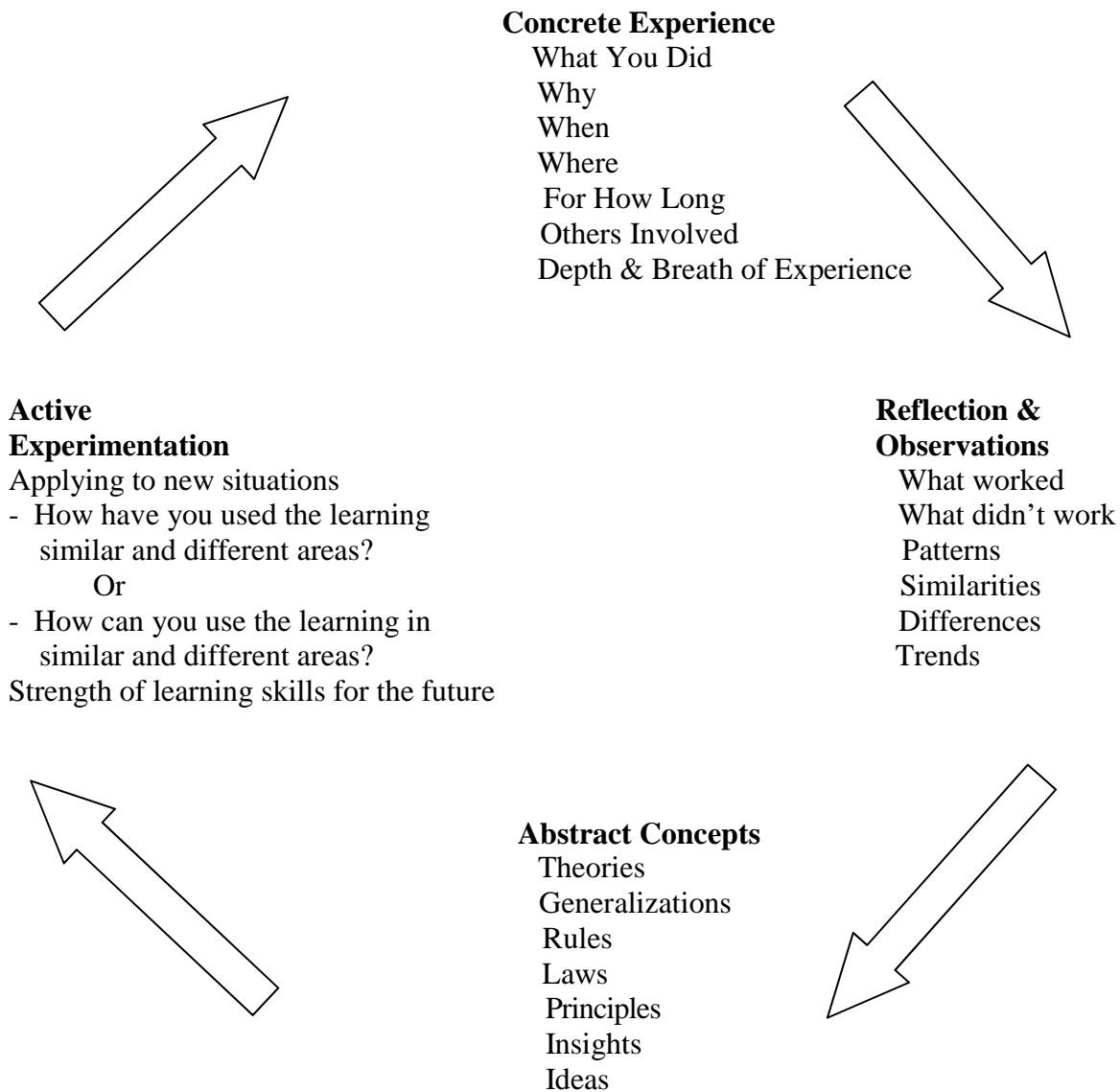
### Cognitive Domain of Bloom's Taxonomy

Levels	Description of Level and skills	Illustrative Terms
<b>100 Knowledge</b> – ability to remember learned material.	Observation and recall of information Knowledge of subject matter Rote memory skills -- facts, terms, procedures, classification systems	arrange, define, duplicate, label, list, memorize, name, order, recognize, relate, recall, repeat, reproduce state
<b>200 Comprehension</b> – ability to grasp the meaning of material.	Understanding information The ability to translate, paraphrase, interpret or extrapolate material	classify, describe, discuss, explain, express, identify, indicate, locate, recognize, report, restate, review, select, translate
<b>300 Application</b> – ability to used learned material in new and concrete situations.	Using information, methods, theories Solving problems using required skills The capacity to transfer knowledge from one setting to another	apply, choose, demonstrate, dramatize, employ, illustrate, interpret, operate, practice, schedule, sketch, solve, use, write
<b>400 Analysis</b> – ability to break down material into its component parts so organizational structure may be understood.	Seeing patterns and organizing parts Recognizing hidden meanings The ability to discover and differentiate the component parts of a larger whole	analyze, appraise, calculate, categorize, compare, contrast, criticize, differentiate, discriminate, distinguish, examine, experiment, question, test
<b>500 Synthesis</b> – ability to put parts together to form a new whole.	Using old ideas to create new ones Generalizing from given facts Relating knowledge from several areas The ability to weave component parts into a coherent whole	arrange, assemble, collect, compose, construct, create, design, develop, formulate, manage, organize, plan, prepare, propose, set up, write
<b>600 Evaluation</b> – ability to judge the value of material.	Comparing and discriminating between ideas  The ability to judge the value or use of information using a set of standards	appraise, argue, assess, attach, choose compare, defend estimate, judge, predict, rate, select, support, value, evaluate

Bloom, B. S., ed., et al. Taxonomy of Educational Objectives: Cognitive Domain. New York: David McKay Company, Inc., 1956.

**Kolb's Model of Experiential Learning**

The Kolb Model illustrates that there is an interaction between theory and experience as continuing learning takes place in the four stages of this cycle:



(Basic model from D.A. Kolb and R. Fry, "Toward an Applied Theory of Experiential Learning," Cary Cooper, ed. Theories of Group Processes, Lond/News: John Wiley and Sons, 1975.)

## 11 – APPENDIX C FACULTY EXPECTATIONS

### GENERAL FACULTY EXPECTATIONS

Essay readers from EOU met to identify guidelines that all APEL essays should follow. The four characteristics they agreed upon are described below:

1. Essays should be focused on topics tied to specific disciplines contained in the EOU Academic Catalog and, if possible, to specific courses
  - a. Easier for the reader to evaluate
  - b. Easier for the student to write and document
  - c. Minimize problems of duplication of credit

**Note 1:** Broad spectrum essays are very difficult to read, evaluate, and assess. The reader is usually placed in a difficult position in that references are not cross-referenced and duplication of credit is possible. The group felt that credit tends to be less in this type of essay. If a general essay is used, it should be subdivided into sections tied to specific topics as above. Evaluation will be facilitated by this structure.

**Note 2:** An exception to the policy of tying topics to specific courses is for the essays written in the Business discipline. Read the Faculty Expectations for Business at <http://www.eou.edu/apel/files/2012/11/FACULTY-EXPECTATIONS-IN-BUSINESS-2013.pdf>

2. The essay must justify the extent of credit requested.
  - a. Nothing in the essay can be done by inference.
  - b. Credit requests should be tied to college academic catalog course descriptions.
3. The essay should have three separate components – theory, application, and learning.
  - a. In the discussion of “theory,” the student should reference current readings, demonstrate knowledge of the area, and cite references that show what they know of the content of the topic being addressed.
  - b. In the discussion of “experience,” the student should explain in detail the experiences that have developed or refined the base of knowledge the student is claiming. This is not to be a chronological listing of experience in the general area of the topic of the essay. It is to be very specific and tied directly to the topic. Other extraneous material should be omitted.
  - c. Students preparing essays should strive to demonstrate a balance between personal experience and an acquired knowledge of general principle of the discipline.
  - d. The essay should demonstrate what the student knows, how they came to know it, how they used it.
4. Documentation for the essay should be complete and focused on the topic of the essay.



## **FACULTY EXPECTATIONS BY DISCIPLINE**

The most current Faculty Expectation Sheets for individual disciplines are available on the web at <http://www.eou.edu/apel/faculty/>. The academic faculty evaluating essays submit this information. A sample of a faculty expectation sheet is provided here to give you insight into the resources that are available online.



## **FACULTY EXPECTATIONS IN BUSINESS**

### **APEL POLICY SUMMARY**

- All APEL essays shall be numbered BA 210 Topics in Business for lower division credit or BA 410, Topics in Business for upper division and each may be granted up to a maximum of 6 credits.
- Rarely can an essay be used for equivalencies for either upper or lower division courses. Students may take a CLEP exam (or challenge a course if a CLEP is not available) if they feel they already have the knowledge base covered in those courses.
- On rare occasions an instructor may decide to use a BA 410 as a substitute for a core course if they feel the outcomes of that course have been met.
- Titles of APEL courses should not be the same as traditional courses. For example, use Topics in Organizational Behavior through APEL as opposed to Organizational Behavior.
- Students are encouraged to write portfolios for their concentration.
- A maximum of 20 BA 210 or BA 410 credits through APEL may be used to meet program requirements for the business administration degree.

### **RATIONALE**

In the past students have written essays directed at equivalency credit for the principles courses including Principles of Management, Principles of Accounting, Principles of Finance and Principles of Marketing. These courses form the theoretical framework of the business degree and tend to be very broad in scope. It is very difficult for students to prove they have the theoretical knowledge gained through their professional experience that meets the outcomes for these courses. Therefore we advise students to write essays that focus on areas of their expertise and that are geared toward meeting requirements in one of the concentration areas such as Marketing or Leadership, Organization, and Management. The purpose of the concentration areas is to give students a significant exposure in a particular field of business with an emphasis on practical experience. Taking the courses that are offered in the concentrations is certainly not the only way to get significant exposure. Therefore, students are encouraged to write essays that are specific to their area of expertise. This policy gives students more of an opportunity to receive credit for their experience. By focusing on their areas of expertise, students can much better demonstrate the knowledge gained from work experience.

### **POLICY**

**Course Number, Title, and Credits.** All business essays will go to Dr. Bob Larison or another Business professor assigned by the Dean of the College of Business. The instructor reading the essay will be responsible for assigning the number of credits to be awarded. Any business credits received through APEL will be assigned a BA 210 or 410 number--Special Topics. The instructor will assign a course title to the BA 210 or 410 courses such as "Issues in Small Business Management through APEL" or some other appropriate title based on the topic of the essay. Instructors should avoid using the same titles for essays as the permanent business courses. Students can earn up to 6 credits for each portfolio. A Maximum of 20 BA credits will count toward meeting Business Administration program requirements.

**Course Substitutions.** On rare occasions the instructor may allow an essay to be substituted for a core class. For example, if a student has significant computer skills that clearly meet the outcomes of BA 325, the instructor may substitute BA 325 for BA 410 Special Topics in Computer Applications Through APEL.

**Credit for Specific Program Courses.** Students can get credit for specific business courses through a CLEP (College Level Examination Program,) or through another program called a DSST (DANTES subject standardized tests). In both of these programs there are exams for a variety of business classes including Principles of Accounting, Business Law, Computer Applications, Principles of Management and Principles of Marketing. By passing an exam, students have proven mastery of the subject area and will be given credit for that course. If the CLEP or DSST is not available for a course, students have the option of challenging the course. The instructor of the course challenged will determine requirements for proving mastery of the course.

### **WHAT TO INCLUDE IN AN ESSAY**

Students may write a general essay or a specific essay. A general essay is one under a broad umbrella topic --- management, marketing, banking etc. and covers a broad area that is addressed in a little depth---just as the courses are. A broad number of topics should be addressed from the general topic and a good general understanding of the topic should be demonstrated. For example a student might write an essay under the general topic of Small Business Management and in that essay include start up issues, personnel issues, managing inventory, managing cash flows, or any other topics related to managing a small business. A specific essay is directed to a specific topic---supervision, advertising, copy design, office management, etc. and should demonstrate a strong knowledge of that specialty---students should use the terminology of the specialty. In both types of essays, students need to demonstrate knowledge of the conceptual base of the topic and practical experience.

#### **Examples of Essay Topics.**

**Banking :** Topics may include management in the banking industry, financial management, or other issues related to the banking industry.

**Management :** Topics include but are not limited to project management, supervision, leadership, quality management, inventory management, small business management, international management issues, or entrepreneurship. If the primary responsibilities were related to management regardless of the industry then essays should be directed toward the leadership, organization, and management concentration.

**Marketing:** Topics include but are not limited to advertising, promotion strategy, retailing, customer satisfaction, and distribution. If the primary responsibilities were related to the marketing function then address the essays toward that concentration.

Submitted by: Dr. Bob Larison, August 23, 2013

Dr. Bob Larison, Faculty Reader, may be contacted at [blarison@eou.edu](mailto:blarison@eou.edu)

## **12 – APPENDIX D SAMPLES OF APEL LEARNING ESSAY PACKET SECTIONS**

- SAMPLE TITLE PAGE/COVER SHEET OF PORTFOLIO BINDER
- SAMPLE TABLE OF CONTENTS
- SAMPLE NARRATIVE
- SAMPLE EXPERIENCE LIST
- SAMPLE FRONT PAGE OF LEARNING ESSAY WITH COMPETENCY STATEMENT
- SAMPLE LEARNING ESSAYS (WITH CREDIT REQUESTS AND ANNOTATED BIBLIOGRAPHIES)
  - SPEECH: INTERPERSONAL COMMUNICATION
  - BUSINESS: INSTRUCTIONAL DESIGN  
“DEVELOPING TRAINING PROGRAMS FOR ADULTS”

**SAMPLE TITLE PAGE FOR APEL LEARNING ESSAY PACKET**

(DISCIPLINE)  
(LEARNING CATEGORY)

SPEECH COMMUNICATION  
INTERPERSONAL COMMUNICATION

NAME  
MAILING ADDRESS  
DAYTIME TELEPHONE  
E-MAIL ADDRESS

EASTERN OREGON UNIVERSITY  
REGIONAL OPERATIONS  
NAME OF APEL 390 INSTRUCTOR

**SAMPLE TABLE OF CONTENTS**

**TABLE OF CONTENTS**

Title Page.....

Transcripts (EOU and Transfer Credits); Previous APEL Learning Essay Packet Evaluations.

Narrative/Life Summary.....

Experience List.....

Competency Statement.....

APEL Essay

    Competency Statement.....

    Learning Essay.....

    Credit Request.....

Annotated Bibliography.....

Documentation

    Letters.....

    Certificates.....

    Awards.....

    Job Descriptions.....

    Etc.....

**SAMPLE NARRATIVE**

*Note: Actual narrative should be double-spaced.*

My life since high school has been interesting, to say the least. I married young, had children young, and divorced young. Throughout my teenage and early twenties, I had a variety of part-time, minimum-wage jobs. I was also in the Army for a short time, but lacked the self-discipline to be successful.

My first good-paying job was working at a local plywood mill. Like everyone else, my first test to work there came by pulling green chain. If you've never done it, or don't know anyone who has, it is one of those jobs where you're either working your butt off for 30 minutes at a time, or sitting on it that long. I moved into the "dry" end of the mill and worked a variety of jobs over my 3 years of time there. Union problems and a strike led to lower pay and a very difficult working environment, so I finally left. Other life issues factored in as well.

Most of my work came in the fast food field, as is likely the case with many younger people. While I lacked the education to go far with some companies, I was able to enter into management with KFC in my late twenties. Through hard work and the work ethic taught early in my life by my grandparents, I entered into management after only six months on the job. Even at this age, much of my life experience and common sense led me to be a somewhat effective leader.

At one point as an assistant manager, I was forced to work 17 straight days while the manager was tending to his girlfriend and newborn daughter. I nearly worked myself into a sick bed, but as my district manager told me when it was over, "The bad news is that you had to do it, but the good news is that you did it." My check for that 2-week period had 80 hours of regular time and around 92 hours of overtime.

However, this period was one of the most successful in my life, or at least I felt that way at the time. After becoming manager of a store, at one point I earned bonuses of \$950 and \$1,500 in two successive quarters. I finally felt like I was successful and was proud of my accomplishments; however, sometimes, good things turn bad. The long hours having to cover for irresponsible employees took their toll and I left after about 4 1/2 years, burnt out on the fast food business. It wasn't the last time I worked in the field, but it was the last time I felt successful there.

I landed in the baking profession around 1997 and felt that I finally found my calling. As a child, I had loved to bake and cook, and often experimented with making my own recipes or adding strange colors to my foods. Baking and I fit together very well with the odd-hours and working by myself for most of my time in the bakery. For almost 8 years, I mixed bread dough, made cakes and cookies, fried and decorated donuts, and baked all kinds of good things.

Since moving to Baker City, jobs have become scarce. I worked at a drug and alcohol treatment center for a couple of years, which I mostly enjoyed. I worked for the local Domino's franchise, but my experience in management mostly went to waste as the owner and I didn't see eye-to-eye on how that business should be run.

My decision to return to school after a long absence came from my love of writing. I have had an idea for a suspense/mystery story about a serial killer for quite some time. When Blue Mountain Community College offered a criminology course one summer, I decided to try and sign up for it, as well as take a writing course to brush up on my skills. Then I found out that I couldn't take any of the courses without enrolling in the college and declaring a major. So I thought, "If I have to declare a major and enroll, I might as well find a way to do it full-time and make it worth my while."

So here I am at EOU, now a junior, pursuing a liberal studies degree with business and communication minors. My desire is to either find an editor position at a newspaper or a magazine, or be a program director/station manager at a radio station. My educational pursuits have led me to be able to work both as a freelance writer at the Record Courier in Baker City and the News and Features Editor at The Voice, in addition to being a DJ at our student-run radio station, KEOL. I am doing things I dreamed of as a teenager...things I never thought I would do. I feel more confident in my chances of obtaining my educational and life goals than I ever have before.

<b>EMPLOYMENT EXPERIENCE</b>		
<b>Date(s) : Pearl S. Buck Foundation, PA; Philippines Liaison</b>		
<b>What I did:</b>	<b>What I learned:</b>	<b>Academic Area:</b>
<ul style="list-style-type: none"> <li>• acted as communication link between sponsor and child</li> <li>• corresponded with sponsors and caseworkers</li> <li>• channeled funds to child's account</li> <li>• maintained information file on several hundred children</li> </ul>	<ul style="list-style-type: none"> <li>• the history and current condition of children fathered and abandoned in SE Asia</li> <li>• how to produce business correspondence</li> <li>• organizational methods to process large amounts of information</li> </ul>	<ul style="list-style-type: none"> <li>• sociology</li> <li>• business writing</li> <li>• records management</li> </ul>
<b>Date(s): Loch Eil Outward Bound School, Scotland; Assistant/Instructor</b>		
<b>What I did:</b>	<b>What I learned:</b>	<b>Academic Area</b>
<ul style="list-style-type: none"> <li>• taught outdoor skills: backpacking, rock climbing, mountaineering, sailing, sea kayaking, camping, navigation, weather, environmental ethics</li> <li>• taught interpersonal skills: teamwork, communication, service, trust building, giving and receiving feedback</li> <li>• obtained Mountain First Aid Certificate</li> <li>• took kayak training course</li> <li>• taught six months of courses to varied age and cultural groups</li> </ul>	<ul style="list-style-type: none"> <li>• how to develop teaching progressions and assess student capabilities</li> <li>• in-depth map and compass skills</li> <li>• how to assess mountain weather</li> <li>• how to facilitate small group discussion and conflict resolution</li> <li>• How to judge objective hazards and deal effectively with emergencies in a wilderness setting.</li> <li>• how to communicate and live with people from other cultures</li> </ul>	<ul style="list-style-type: none"> <li>• education</li> <li>• physical geography</li> <li>• meteorology</li> <li>• speech/communication</li> <li>• organizational behavior</li> <li>• health/first aid</li> <li>• intercultural communication</li> </ul>
<b>Date(s): Hurricane Island Outward Bound School, ME; Assistant /Instructor</b>		
<b>What I did:</b>	<b>What I learned:</b>	<b>Academic Area</b>
<ul style="list-style-type: none"> <li>• taught outdoor technical skills,</li> </ul>	<ul style="list-style-type: none"> <li>• how to develop curricula and lesson</li> </ul>	<ul style="list-style-type: none"> <li>• education</li> <li>• professional development</li> </ul>

<p>backpacking, rock climbing, sea kayaking, flat water canoeing, whitewater canoeing and rafting, winter camping</p> <ul style="list-style-type: none"> <li>attended training for specific student populations (adolescent/corporate groups)</li> <li>obtained Marine Guides License for whitewater rafting</li> <li>obtained Lifeguard and CPR certification</li> <li>attended river rescue training</li> </ul>	<p>plans to fit an expedition itinerary</p> <ul style="list-style-type: none"> <li>how to train my assistant to be ready for promotion to instructor</li> <li>how to adapt the curriculum to suit the needs of the student population</li> <li>water safety, swimmer rescue and whitewater rescue techniques</li> <li>learned CPR skills</li> </ul>	<ul style="list-style-type: none"> <li>health/physical education</li> <li>first aid</li> </ul>
<p>Date(s): Alta Lodge, UT; Front Desk Clerk</p>		
<p>What I did:</p>	<p>What I Learned:</p>	<p>Academic Area:</p>
<ul style="list-style-type: none"> <li>answered phones</li> <li>made reservations</li> <li>reconciled billings</li> <li>provided information for guests</li> </ul>	<ul style="list-style-type: none"> <li>to operate multi-line switchboard</li> <li>effective customer service</li> <li>conflict resolution</li> </ul>	<ul style="list-style-type: none"> <li>office procedures</li> <li>speech communication</li> </ul>
<p>Date(s): Gould Academy, ME; Recreation Program Coordinator</p>		
<ul style="list-style-type: none"> <li>organized daily recreation for 40 students</li> <li>organized special events</li> <li>supervised two interns</li> <li>student dorm supervisor</li> </ul>	<ul style="list-style-type: none"> <li>how to motivate adolescents</li> <li>how to coordinate multiple activities simultaneously</li> <li>how to harness peer power to influence adolescents</li> </ul>	<ul style="list-style-type: none"> <li>education</li> <li>time management</li> <li>education</li> </ul>
<p>Date(s): Sunday River Ski Area, ME; Dispatcher/Patroller/Hill Chief</p>		
<p>What I did:</p>	<p>What I learned:</p>	<p>Academic Area:</p>
<ul style="list-style-type: none"> <li>administered first aid and coordinate rescue efforts</li> <li>documented accidents and researched accident claims</li> <li>documented accidents and researched accident claims</li> </ul>	<ul style="list-style-type: none"> <li>the reality of administering first aid in difficult situations</li> <li>how to effectively manage an emergency</li> <li>how to think and act quickly and lucidly under pressure</li> <li>how to thoroughly</li> </ul>	<ul style="list-style-type: none"> <li>health/first aid</li> <li>business/report writing</li> <li>education</li> <li>personnel management,</li> <li>organizational behavior</li> <li>physiology/health</li> </ul>



<ul style="list-style-type: none"> <li>operated VHF/UHF radios</li> <li>monitored trail equipment and safety</li> <li>trained new patrollers: ran weekly clinics</li> <li>supervised 10 full-time patrollers and 40 volunteers</li> <li>coordinated work schedule and assignments</li> <li>obtained EMT Certification</li> </ul>	<ul style="list-style-type: none"> <li>document an event incorporating many viewpoints</li> <li>how to run training clinics for people with varying skills and experience</li> <li>how to effectively manage a volunteer workforce utilizing strengths and supporting weaknesses</li> <li>basic anatomy and physiology and advanced first aid skills</li> </ul>	
Date(s): Pacific Crest Outward Bound, CA; Instructor		
What I did:	What I learned:	Academic Area:
<ul style="list-style-type: none"> <li>taught mountaineering courses</li> <li>taught interpersonal skills, facilitated group process, conflict resolution, teamwork and trust building</li> <li>trained several assistants</li> </ul>	<ul style="list-style-type: none"> <li>how to deal with effects of altitude and dry climate</li> <li>how to empower and support my assistants to enhance their learning</li> </ul>	<ul style="list-style-type: none"> <li>physiology</li> <li>education/professional development</li> </ul>
Date(s): Pacific Crest Outward Bound, OR; Training Coordinator		
What I did:	What I learned:	Academic Area:
<ul style="list-style-type: none"> <li>coordinated the implementation of 40 pre-season trainings</li> <li>taught and supervised trainers on new staff training</li> </ul>	<ul style="list-style-type: none"> <li>how to prioritize many people's needs</li> <li>how to design staff training curriculum</li> </ul>	<ul style="list-style-type: none"> <li>organizational behavior</li> <li>education/professional development</li> </ul>
Date(s): Pacific Crest Outward Bound, CA; Chief Instructor		
What I did:	What I learned:	Academic Area:
<ul style="list-style-type: none"> <li>developed a new course area and curriculum format</li> <li>supervised, trained and evaluated 3-9 staff</li> <li>organized course starts, ends and resupplies</li> <li>interacted with land</li> </ul>	<ul style="list-style-type: none"> <li>how to develop and implement a plan and remain flexible when plans need to change</li> <li>supervisory skills; Listening, setting expectations and parameters,</li> </ul>	<ul style="list-style-type: none"> <li>business management</li> <li>personnel management</li> <li>public speaking</li> <li>education</li> </ul>

<p>managers and organized service projects</p> <ul style="list-style-type: none"> <li>gave intro and conclusive talks to students and staff on each course</li> </ul>	<p>performance evaluation, giving and receiving feedback</p> <ul style="list-style-type: none"> <li>skills to deal with situations where many variables were beyond my control</li> <li>public relations/speaking</li> <li>how to help students translate and take home their experience</li> </ul>	
<p>Date(s): Pacific Crest Outward Bound, OR; Oregon Administrative Services Director</p>		
<ul style="list-style-type: none"> <li>developed a plan to recruit and hire 50-75 staff each season</li> <li>developed slide presentation and visual display to take on college recruiting trips</li> <li>attended international, national, and regional experiential education conferences</li> <li>interviewed 100-150 applicants every season; designed application process and forms</li> <li>developed and implemented Human Resources management system including origination of an Employee Manual and Supervisor's Manual</li> <li>maintained and developed contracting and payroll database</li> <li>and implemented trainings and workshops</li> <li>supervised a department of five people responsible for</li> </ul>	<ul style="list-style-type: none"> <li>how to develop a plan with goals</li> <li>how to "sell" Outward Bound</li> <li>how to network, how to find sources of information and potential staff</li> <li>how to interview to get and give the most information in an efficient amount of time</li> <li>how to write personnel policies</li> <li>how to use and adapt database programs</li> <li>how to implement an information system with a critical function across three states involving many individuals</li> <li>public speaking and workshop presentation skills</li> <li>long term supervisory skills</li> <li>how to plan and manage a budget of \$270,000</li> </ul>	<ul style="list-style-type: none"> <li>business management</li> <li>marketing</li> <li>personnel management/recruiting</li> <li>information systems management</li> <li>public speaking communications</li> <li>education</li> <li>managerial accounting</li> </ul>

<b>Other Experience</b>		
What I did:	What I learned:	Academic Area:
Date(s) Lived in Britain		
<ul style="list-style-type: none"> <li>worked/lived on a dairy farm</li> <li>climbed in Scotland, Wales, and England</li> <li>many multi-day bike tours in England and Scotland</li> <li>sea kayaking trips in Scotland</li> <li>travel along by bike or train several times               <ul style="list-style-type: none"> <li>got married</li> <li>hitchhiked thousands of miles with my husband</li> </ul> </li> </ul> <p>Date(s) four week Bicycle Tour London-Paris-Normandy-London</p> <p>Date(s) Two week climbing expedition: Chamonix, France</p> <p>Date(s) Three week climbing expedition: Teton, Wyoming</p> <p>Date(s) Three week sea kayaking expedition: Glacier Bay, Alaska</p> <p>Date(s) two week trip to Spain: four week trip to Britain</p>	<ul style="list-style-type: none"> <li>how to live in a different culture</li> <li>how to communicate in the “same” language when words have different meaning</li> <li>how to birth, feed, clean, and milk cows; how to plant an harvest potatoes; how to make butter and bread</li> <li>how to build a real partnership</li> <li>how to hitchhike safely</li> <li>how to evaluate danger and my own abilities</li> <li>how to adapt easily to change</li> <li>how to communicate with people whose language I do not speak</li> <li>how to do CPR for real</li> <li>about marine ecology and wildlife of SE Alaska and Baja, Mexico</li> <li>how to operate in a male dominated environment as a woman</li> </ul>	<ul style="list-style-type: none"> <li>international studies</li> <li>intercultural communication</li> <li>agri-business/livestock management</li> <li>interpersonal communication</li> <li>speech/communication</li> <li>health/first aid</li> <li>marine biology</li> <li>women’s studies</li> </ul>
<b>Volunteer Experience</b>		
What I did:	What I learned:	Academic Area:
<p>Date(s) Portland Mountain Rescue Team</p> <p>Date(s) SOAR: Guided a blind skier</p>	<ul style="list-style-type: none"> <li>how the SAR system operates in Oregon</li> <li>how to be very precise in oral communication</li> </ul>	<ul style="list-style-type: none"> <li>public administration</li> <li>speech/communication</li> </ul>

**ESSAY WITH COMPETENCY STATEMENT**

**Competency Statement:** I have worked as a 1) research and development officer in marketing for Western Bank; (2) store owner; (3) grant coordinator; (4) and developer for a non-profit special childcare program. I know the advanced concepts and procedures of marketing well enough to present a marketing plan to the board of director of a large corporation, to assist small business owners in marketing techniques, and to develop a successful marketing plan as part of a grant proposal for a local community college.

**SAMPLE LEARNING ESSAY**

*(NOTE: ACTUAL ESSAYS SHOULD BE DOUBLE-SPACED TO FACILITATE EASIER READING AND ALLOW SPACE FOR FACULTY COMMENTS)*

**Speech: Interpersonal Communication****Everybody's Talking**

Every living thing communicates. A wilted plant is saying, "I'm thirsty." A growling dog is saying, "Stay away." A crying baby could be saying, "I'm hot/cold/sweaty," or "My diaper is wet/dirty/falling off," or "Those peas you fed me gave me gas." Human communication is amazingly complex.

My first job introduced me to workplace communication. At age seventeen, fresh out of high school, I was employed by Sears, Roebuck and Company, in Riverside, California, to work in their credit department. My position was at the front counter, which meant I was the first person a customer would come in contact with. Although most people were courteous, those with complaints, or late on their payments, could be very rude. I was brought to tears a few times before I learned not to take it personally.

**The Theory**

"Interpersonal", relating to, or involving relations between persons, and "communication", a means of communicating, is generally agreed to cover the variety of ways individuals communicate with other individuals, one on one, or in groups. Some texts extensively cover these ways, including communication between married couples, parents and children, co-workers, doctors and patients, and infinitely more combinations. In People Skills, by Robert Bolton, the five keys to good interpersonal communication given are: listening, assertion, conflict resolution, collaborative problem solving, and skill selection. Within these broad categories are many sub-categories: reflective listening, body language, non-verbal communication, self-disclosure, explanation, and reinforcement. Each sub-category has its own guidelines for proper usage. Here is an example: In People Skills, if you want to use the 'reflecting' technique, you should "vary your responses", "focus on the feelings", and "choose the most accurate feeling word." What are feeling words? Angry, infuriated, disturbed, spiteful and kind are a few listed. The speaker chooses words to fit the situation. The key to good communication is to understand what method should be used to most clearly and efficiently communicate the information most vital to the situation.

**Real Life**

In truth, most of us don't communicate all that well. For every mediator with time and skill to give, there are thousands of ordinary people who must hash out their difficulties unassisted. Modern technologies bring cell phone calls, text messages, pagers, email and Internet instant messaging to us twenty-four hours a day. The communication overload allows little time for thinking about what we want to say, and how.

**Communication:  
A Critical Part of Public Safety**

A decade after leaving Sears, I was employed by a communications organization in the Los Angeles area. This facility, based in Hawthorne, California, was a civilian organization that handled emergency calls, and dispatched fire and police for certain Southern California cities. Originally designed for up to ten cities, it had six when I was employed there. Two cities, Hawthorne and Gardena, were not-so-jokingly called "major felony cities" by the officers who worked in them. The other four, Redondo Beach, Hermosa Beach, Manhattan Beach and El Segundo, were typical beach towns spread along the southern California coast. It was here, during 480 hours of training, that I first learned communication techniques, and found the antidote to the lack of fulfillment in my own life.

**First Contact**

Nearly 96 percent of the United States now has a functioning 9-1-1 system, or its equivalent. This number, 9-1-1, is the "Universal Emergency Number" for anyone within the United States or Canada. I was trained as an "emergency request processor", the person who is your first contact when you dial 9-1-1 for help. I was taught listening and questioning techniques designed to quickly obtain the right information to facilitate a proper response by emergency personnel. It could be very difficult, and here is why: many of the clues we use to decode what a

person is actually saying, beyond the content of the words, were missing. Facial expression, body language, including touching and gesturing, reactions of others who may be close by, even smells, can contribute to the stream of information being received. A lie that may not show up in the voice might in averted eyes or nervous finger tapping. The 9-1-1 operator, however, has only a voice and an address on a computer screen.

### **Listening to what they are really saying**

The first, and I think most critical, skill I learned was how to listen. Most of us listen with only half our attention, while the other half is thinking about what we are going to say in response. When I answered the phone, “9-1-1, may I help you,” I had to give my complete attention to that voice on the line. People Skills defines “attending” as “listening with the whole body”, and that is what I did. I had to give the caller the reassurance that I was entirely focused on him alone, and I had to do it with only my words and voice. To do this I had to respond with appropriate answers to his questions, and that meant listening. Just a week or two after I was allowed to take calls on my own, I made a mistake, which reinforced this lesson. A woman had been assaulted behind a bank in El Segundo. Terrified, she drove home to Manhattan Beach before calling the police. As I spoke to the woman, I began to react to the emotion in her voice, and I did not hear her say where the assault occurred. When officers responded to her home, they obtained the right location and a good description of the suspect. This was immediately broadcast to the surrounding cities, where an El Segundo officer realized he had seen the suspect shortly after the incident not far from the bank. Had I listened with my full attention, and noted that significant fact to the dispatcher, it would have been heard by the El Segundo officer immediately after the attack and the suspect might have been caught. Although I was not reprimanded for my mistake, I often thought about that woman, and how she felt knowing her assailant was still free.

The five elements of listening, as given in Looking Out/ Looking In are: hearing, attending, understanding, responding, and remembering. Hearing is the physical process of sound entering the ear and being sent to the brain. Attending is listening with the “whole body”, but also filtering out those sounds not relevant to, or distracting to the primary conversation. Understanding is to “make sense of a message”, to accurately perceive what the other person intended. Responding is giving “observable feedback to the speaker”, and that feedback may be reflective. Remembering is to recall what has been said previously, without mistakes.

### **How to ask a question – quickly**

In Social Skills in Interpersonal Communication, the author lists twelve main functions of questions. Number one is “to obtain information”, and number two is “to maintain control of the interaction.” In emergency communications, these functions are the most important. When help is needed, the first piece of information requested is the location of the emergency. Most modern 9-1-1 systems have directories that tie the incoming phone number to the residence address, but the street address does not give complete information. Here is an example: John S. calls to say he hears noises outside. I would say, “You live at 123 First St, is that correct?” John S. replies that he does, in the back. I ask, “You live in the back of the house at 123 First St.?” John S. replies, “Yeah.” What does he mean? Does he live inside the house at that address, but in a room in the back? Does it have an enclosed rear porch that he stays in? Does he have a trailer? Each question leads to another, until I discover that John S. lives in a separate guest house, a converted garage, to the rear of the given address. Now responding officers know where they are going, and where the complainant is located. To ensure officer safety, it is important to completely define where “live” is.

The second function of questions, to maintain control, is also important, because emergency personnel response time can be slowed by a belligerent or hysterical caller. Often this requires quite a bit of one of the sub-categories: explanation. An irate man or woman will call and say, “Just send the police; I want to talk to them directly.” They refuse to give any further information, so before we can proceed we must first explain to the citizen why we need to know the problem first. This form of explanation uses the definition in Social Skills in Interpersonal Communication that says, “To explain is to give understanding to another,” rather than to define explanation as description or instruction. I will explain to him *why* officers want to know certain facts before they respond to a situation, so the citizen will *understand* why I want to know. Usually this is sufficient to calm the caller and remain in control of the call.

### **Repeat, clarify, translate**

During the years I worked as a public safety communications operator, I learned to apply some basic principles of interpersonal communication, even though I did not know that was what I was doing.

In this narrow area of communication, via the telephone in emergency situations, here are the three steps that incorporate communication principles, and must be taken to ensure the safety of citizen and public safety personnel alike: 1) repeat - repeat any pertinent information back to the caller and verify it is correct. There are many confusing street and place names in our cities, and mistakes can easily be made, 2) clarify - what is the problem? Make sure you understand the situation you are sending emergency personnel into, 3) translate-put what you know into the proper form. The wording of the incident will determine the response; “a drunk on the corner of 1<sup>st</sup> and Main” will require a different response than “man down in the street, 1<sup>st</sup> and Main.”

The skills I learned dealing with the public in emergency situations would stay with me as I moved into a new environment: the classroom.

### **Communication: The parent, teacher, student triad-plus one**

After my fourth child was born I left public safety to be a stay-at-home mom. I remembered the skills I had learned, and applied them in my own home, where I generally encountered more “situations” in one day that I had in a year in public safety! Communication between parent and child, in all its manifestations, is a subject that will never be completely covered. I also realized that I did not want to return to an office environment. I felt fulfilled helping people, and by being a parent. So, when I went back to work, I looked for a position that would give me that sense of satisfaction. I found it at my children’s elementary school, in a Special Needs classroom.

In a General Education classroom there is usually only one adult, the teacher. In a Special Education classroom there are additional adults, called aides, whose job is to assist the teacher with a group of students who will have a variety of disabilities. The class size is a half to a third of the standard class size, depending on grade level. The three sides of the basic educational unit, the parent, the student, and the teacher, are supplemented by the aide, who becomes a type of middle manager.

#### **The classroom middle manager**

Aides are considered para-educators, and they do many of the same functions as the teacher does. Although primary responsibility for instruction, assessment and communication lies with the teacher, the aide functions as a kind of middle manager. She (aides are overwhelmingly women with children) communicates with parents, counselors, therapists and other school personnel who come in contact with her students, along with taking care of the physical needs of the students, and providing small group or one-on-one instruction.

#### **Parents – responding to their concerns**

The five areas of interpersonal communication from People Skills that I noted earlier are all used extensively in Special Needs education. Although I have worked with different age groups, the last two years I have worked with kindergarten students. This is an age level where we can begin to determine how far a child might progress within the limits of his disability. It is usually a difficult time for parents. This year my class has eleven students; three have physical and/or mental genetic based disabilities, two are ADD/ADHD, one has seizure disorders, one has lack of emotional control from poor parenting in his infancy, and four are autistic. Because of confidentiality requirements, I will not use the real names of the students or families in this essay, but everything else is accurate.

Again, listening is the most important skill, and quite often it occurs during one on one discourse. Parents want to know how their child is functioning in the classroom, and they want him to be safe. A conversation with a parent dropping off his or her child will combine informational listening, “accurately receiving the thoughts the other person is trying to convey”, and listening to help, “to help others with their problems.” (Looking Out/ Looking In, Chapter 7) When the classroom first opens in the morning, it is noisy and there are quite a few distractions.

Eliminating distractions so as to fully concentrate on the parent may require stepping outside the room, or off into a corner, while still “keeping my ears open” in case of problems between the students. While doing this I listen for some key phrases, “he didn’t sleep very well last night,” or “his brother has been sick”, which gives a clue about how the child might behave that day, and how his parent might be feeling. It might indicate a situation in the home that the parent does not want to disclose. I have learned to watch body language, and hear voice intonations that might indicate hesitancy or unhappiness. The world of Special Needs children is often insecure. Many conditions are still not fully explained, such as autism. The medical community does not know how autism develops, if it is inherited or environmental or a combination of both. So, like many other conditions, we watch and assess the autistic child daily. My responses need to reassure the parent that we will accommodate the child’s particular needs that day. For example in the case of the child who didn’t

sleep well, I might tell the parent that the child can lie down on the beanbag chairs for a time, if he gets too sleepy. Acknowledging their concern and responding to it reassures them, and may elicit additional disclosure if the situation is more complicated than it seems. In the case of information I may know, but am not authorized to discuss, I will make sure the parent is directed to the teacher or other school personnel.

### **Teachers – the harried executives**

The teacher is the boss of the classroom. In order to be effective, she needs to communicate her needs clearly to the aides. Very often this is accomplished in short bursts of talk between lessons or trips to the bathroom. Here is where two key parts of the listening process pay off: understanding and remembering. Understanding means not just hearing the words, “C’s mother is out of town again,” but remembering that student C always has a difficult time when mother is away. Now the teacher and I will have a conversation about his state of mind when he arrived on the bus, what he said, if anything, about his mother, and what event planned during the day might stretch his emotions a little too tight. This is a quick mix, usually done within just a few minutes, with the essence of the information communicated efficiently to everyone, past information recalled, and plans made for potential problems. Longer discussions must wait for the end of the day, our “deep breath” time.

The form of communication that occurs between the four of us in our classroom, or among our teacher and other teachers, or staff, cannot be considered interpersonal communication according to the definition in Looking Out/ Looking In. It is somewhere between the impersonal, a two minute conversation with a store clerk, and the truly interpersonal, with a marriage partner or life long friend. Still, it is true communication, and many of the elements of listening, questioning, asserting and perceiving are just as critical in the school environment as in the home or business.

### **Students – the importance of clarity and consistency**

This is the area in which the widest range of communication is used. Whether dealing with General Education or Special Needs children, the keys of listening, assertion, conflict resolution, and collaborative problem-solving are absolutely necessary in daily interaction. Here are some examples from my class.

The ability to listen takes on added importance when you have a child who cannot talk clearly. This student is physically agile, mentally quite sharp, but has a genetic deformation of the upper mouth that does not allow proper air flow during speech. His speech is nasal and nearly incomprehensible; however, it is a condition which doctors believe is correctable by surgery at about age 7. Meanwhile, how do I understand this not quite 6 year old clearly enough so that his own sense of success and worth is not diminished? By using the same techniques listed as part of informational listening in Looking Out/ Looking In. First is to talk less. When he talks to me I look right at him and don’t say anything other than asking him to repeat the sentence until I get it. This is, of course, done with a smile. (Except on Friday, just before dismissal.) Secondly, I get rid of distractions. If another student is talking nearby, we move away. Third, I don’t “judge prematurely.” Sometimes I am in a hurry or aggravated with him if he has been behaving particularly rascally that day. Instead of cutting him off, or assuming I know what he wants, I wait until I have heard the sentence a few times. Fourth, I do look for key ideas, such as a word I know that is repeated. I’ve learned over the months to listen to the unique intonations of his voice, and I can pick out quite a lot of his vocabulary. When he is using a word with a definite ‘short I’ sound, accompanied by pointing at another student, I’m pretty sure that other student has hit him. And, I continue to ask questions, listening for yes or no sounds, and watching his expressions. Eventually I will figure out and respond to what he is saying. He will leave knowing his problem was addressed.

Assertion is important to me, as I lack the inherit “aura of assertiveness” that teachers have. I am, however, an adult in a room full of small children. Part of my job is to show them correct behaviors. Chapter 11 of People Skills lists a number of ways to show assertiveness without worsening the situation. Two that are used frequently in our classroom are “options” and “consequences.” When a child is misbehaving, he or she is given options: “sit still on your spot or move to another,” or “sit still or leave the circle (take a time out).” Time outs are usually thought of as punishment but they serve two purposes: to remove the child from the area of conflict and to show the child that he has not maintained self-control and cannot participate in the activity. He has seen the consequences of his misbehavior and I have asserted my control over his actions.

There are many conflicts within the educational process, just as there are in any area of modern life. Negotiation between parents who want certain services for their child and a school district that cannot, or will not, provide them can be just as intense as any labor or political negotiation. Within the walls of my classroom, conflict resolution takes on a different priority. First is to make sure no one gets hurt. All children are unaware of how dangerous physical violence can be. It takes quite a few years, and a lot of repetitive correction from adults, to convince a child that it hurts just as much



when he hits someone as when he is hit. In the Special Needs classroom, often there are children who are unable to control their impulses and actions. Their perception of themselves and the world around them is not the same as their General

Education peers, so their reactions to aggression or chaotic situations can be unpredictable. Therefore it is especially important that the skills I have learned to resolve conflicts be a model for these children.

The conflict resolution method listed in Chapter 13 of People Skills is useful in a classroom setting, whereas other, more complicated methods would not be. Bolton's method is to first, treat the other person with respect, second, listen until you understand the other side, third, state your own views, needs and feelings. In a situation where child J has knocked toys out of L's hands, my first move is to have J stop and apologize to L. ('Signing' or gestures can be used by non-verbal children.) J needs to recognize he has caused unhappiness to that child, and show respect by making amends. Secondly, if they are verbal children, I will ask L to tell J how unhappy it made him to have the toys taken away. Third, I will ask J to try and explain to L why he behaved the way he did. The whole process has to be short, because the attention spans are, but the motive is to instill empathy in both children. One step in learning self-control is to understand the pain our actions can cause.

Collaborative problem solving occurs daily in our room—it's called teamwork. Doing puzzles and building Lego's together are the foundations of learning problem solving. Anything harder than that is left to the grown-ups.

### **Summary**

My experience in public safety and education has given me substantial experience in communication. Through study and experience I have learned how to take a communication technique and use it in many different situations. Working with children with speech and language disabilities has inspired me to experiment with known principles of communication and see if they can be applied in new and original ways. I will continue to learn how to communicate.

### **Credit Request**

In this essay I have demonstrated my understanding of communication principles and how to apply them to various situations. I respectfully request three lower division credits in Speech: Interpersonal Communication, and request that they be approved for General Education requirements in Language and Logic.

### **Annotated Bibliography**

Bolton, Robert, Ph.D. People Skills, Simon and Schuster, New York, 1979

This book is an excellent reference for communication. It is clearly written and contains general information that can be applied in many situations. It is currently used as a text in one of eight classes for the Master of Conflict Resolution and Negotiation Management degree at California State University, Dominguez Hills.

Adler, Ronald B., and Towne, Neil. Looking Out/ Looking In, Harcourt Brace College Publishers, Orlando, 2002.

This text, used in Eastern Oregon University's "Interpersonal Communication: Speech 111" course was my formal introduction to the principles of communication. Much of what I read I had already learned during the course of my employment, but I found this text very educational. It was organized and explanatory.

Hargie, Owen. Social Skills in Interpersonal Communication, Brookline Books, Cambridge, Massachusetts, 1981.

The writing in this book was a little dense, but its charts were good and it provided additional explanation in many areas.



Development (ASTD), and attend the monthly meetings and educational sessions held in our area. As stated on the ASTD website, "ASTD is the world's largest association dedicated to workplace learning and performance professionals. ASTD started in 1944 and has widened the profession's focus to link learning and performance to individual and organizational results" ([http://www.astd.org/ASTD/About ASTD](http://www.astd.org/ASTD/About%20ASTD)).

As an Associate Trainer, my overall goal was to facilitate all of the computer-based training programs (i.e. Excel, Word, PowerPoint, Outlook, etc.). Craig knew that it would take some time to get me up to speed, so he designated my first couple of months as "learning months". My first task when hired was to sit in on all of the courses being facilitated by the other trainers in our department. Some were Associate Trainers like me; others were Training Specialists-most had several years of experience in the training field, and master's degrees in Adult Education. In conjunction with attending all of the training programs, I also attended an "in-house" course called "Trainer Development", taught by Craig himself. This was an 18 hour course designed to teach trainers the theories behind adult education, proper facilitation techniques, and the principles behind developing a training course. This included discussions on the difference between the pedagogy and andragogy teaching styles. As stated in the ASTD Handbook, "pedagogy means the art and science of teaching children", and "andragogy means the art and science of helping adults learn" (p. 253). We also discussed the facts that adults learn from their past experiences -good, bad, and otherwise -as well as the fact that adults learn best when engaged in learning activities with other individuals.

The combination of attending "Trainer Development", and sitting in on all of the training classes, was an exceptional learning experience for me. I could actually see the concepts Craig was teaching in "Trainer Development" come alive! Once I had completed "Trainer Development" and sat in on all of the other training programs, I began facilitation of the computer-based training classes. However, Craig assigned another trainer to attend each one of my classes until he felt I was ready to roll on my own. Craig would also randomly pop in to evaluate me as well. These courses were fairly easy to facilitate -although at the time I didn't think so -because they weren't focused on any particular theory or principle. I simply taught participants the ins and outs of how to use the different software packages, by implementing the basic skills Craig had taught in "Trainer Development" (Le. asking open ended questions, utilizing appropriate learning exercises, developing effective transitions from one topic to another, etc.).

It took a good year before Craig felt I was up to par and ready to transition from teaching computer-based classes to teaching my first real class called "How to do On-the-Job Training". This course was designed to teach individuals how to effectively train individuals on how to do a specific job. Throughout the course, participants identified different learning styles, defined the difference between a duty and a task, and discussed the steps involved in writing a task list.

Once I mastered the content and facilitation of this class, I was promoted to Training Specialist and was given the "ok" to make revisions to other courses I was assigned, and develop courses of my own based on needs assessment results. This is where the ADDIE model comes in to play. Craig taught me from day one that the ADDIE model was the best model to use when developing a course. However, as noted in Pfeifer's *Mastering the Instructional Design Process* (1998), the ADDIE model is only one of "over 40 systematic instructional design models that have been developed to guide instructional designers in their work" (p. 9). Not all models are designed to be used in the development of all types of courses. Siemens states on the eLearningspace website that "at best, a model is a representation of actual occurrences and, as such, should be utilized only to the extent that it is manageable for the particular situation or task. Put another way, perhaps one model is more effective

for designing a math course, and another model is more effective for designing soft skill courses (like managing people, customer service, etc.)"

(<http://www.elearnspace.org/Articles/InstructionalDesign.htm>).

Craig's belief in this model, as well as mine, doesn't go unshared. The ASTD Handbook states that the ADDIE Model is "**the most prevalent and widely adopted model**. The main elements of this model are analysis design, development, implantation, and evaluation" (p. 268 -269). The Instruction Design Exchange website unveils the fact that "the ADDIE model has also **become widely used by the Armed Forces and business and industry**"

(<http://idxchange.blogspot.com/2005/05/who-crafted-addie-model.html>).

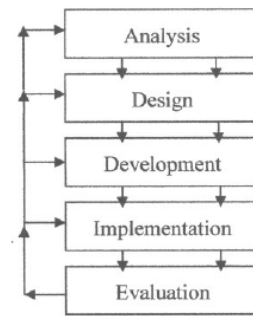


Figure 13-1. Addie Model  
Taken from the ASTD Handbook

Given the fact that my knowledge and experience in instructional design is based on the ADDIE model, the remaining portion of this paper will be focusing on defining each step incorporated in it, as well as the experience I've gained in using it.

## Analysis

Although there are over 40 instructional design models to choose from, Pfeifer states in *Mastering the Instructional Design Process* that "all of the models have at least one feature in common; they base instruction on performance requirements in a dynamic, sequential, and multistage process" (p. 53). In other words, they all share the idea that prior to embarking on instructional development, there must be evidence of a performance deficiency. However, in doing further research on this subject, I discovered that even though all of the models share the common idea that a needs assessment should be conducted, several of the models listed different steps to their needs assessments. The steps we followed at Micron are directly in line with the steps listed in the *American Society of Training and Development Handbook* (p. 271 -272).

These steps are:

1. **"Define the system of interest** –Whose problem is going to be solved? Are we interested in the whole organization, or just a department?"  
**What I Did:** Each member of the Training and Development department was assigned a specific department to work with. I was assigned the Accounting department because I worked there previously and knew their processes and procedures. This included ALL aspects of accounting (AP,AR, and Credit).
2. **"Determine performance deficiencies** -Are people performing below expectations, or are new services being offered that employees will need to be trained on? These questions usually require the instructional designer to gather data either through focus groups, interviews, observations, etc."  
**What I Did:** *The first thing I did in conducting my needs assessment of the Accounting department was facilitate focus groups consisting of employees only (without supervisors or managers). This allowed the employees to speak freely without the feeling of being "punished" later for saying the wrong thing. The first thing the group did was identify all of the skills required to do the jobs they had. They then determined as a group the areas they felt they were lacking in. As the facilitator, I was responsible for asking the questions to prompt the results we were looking for and keep the group on track. Several focus groups were required for each group to ensure we incorporated ALL aspects of their jobs.*
3. **"Separate incentive, management, and ignorance problems** –Once the deficiencies have

been identified, the source of the deficiency needs to be identified. First, people may lack the knowledge or skills to do the job. Second, they may have the skills to do the job but they fail to do so because they aren't motivated. Third, people know how to do the job, and want to do the job, but are prevented from doing so because of inadequate tools, poor communication, or management problems."

*What I Did:* Part of the focus groups included asking questions about why the group felt they were reaching road blocks in certain areas. For example, if they stated they ran into road blocks every time they ran their month-end or year-end reports I would ask them to explain the process. I might then have to prompt them with additional questions to determine if employees were lacking skills in a specific area, or if the inadequacy was caused by something else.

4. **"State problem to be solved**-State explicitly the problem(s) to be solved."

*What I did:* Once I completed the focus groups I reviewed the data received and concluded whether additional training was needed, or if there was a motivation or management issue. I would then gather the groups together to go over the results and make sure I didn't leave anything out. The results were then reported to the managers and supervisors.

5. **"Determine cost-benefit payoff** -Training may not be justified if the projected benefits are less than the projected costs."

*What I did:* Most of the training issues that arose at Micron were satisfied with classes that had already been developed. If that was the case, I would simply make my recommendation on the class I thought needed to be attended. However, there were a few occasions when new classes needed to be developed.

As Trainers we were not only assigned different departments, but we were also assigned different realms of courses to facilitate, improve upon, and develop. For example, I was assigned the Accounting department, as well as the duty to facilitate and develop courses relating to customer service, communication, and presentation skills. If another trainer conducted a needs assessment on his/her department and discovered that they needed a course on how to give effective presentations, I would have been assigned the job of facilitating an already developed course, or developing a new course if needed.

The assessment phase didn't stop here, however. Once the determination had been made that a new course was needed to be developed, the assessment phase changed focus from 20 analyzing gaps in performance and skills, to identifying the specific characteristics of each individual learner that would be attending the new course. This meant identifying their age range, their different job types, learning styles, but most importantly the skills and knowledge the group already had before attending the course.

Mastering the Instructional Design Process relates this phase to marketing, in that learners are no different than any other consumer. It specifically states that "learners are consumers of services provided by instructional designers" (p. 54). It goes on to say that "the key to success in instructional design, as in marketing, is to make selling superfluous. The aim is to understand the customers so well that the product or service fits them and sells itself" (p. 54).

My personal experience in this area has taught me that the best way to identify learner characteristics is to talk to each and every participant prior to moving forward in the development phase. The needs assessment will give the designer an idea as to what the group as a whole needs, but talking to each learner separately will help the designer target each learner's individual needs. Ask them about their past experience, what they know about the subject already, and how they feel they learn best (listening, engaging, or watching). This will assist the developer in utilizing appropriate content,

examples, and individual and group exercises in the course.

In my opinion, the assessment phase is the most critical phase. If important information about the learners is missed or ignored, the class being designed will not meet all of the learning needs on the topic. It is imperative to take your time in this phase to ensure that a thorough assessment is conducted.

## **Design**

After the completion of a thorough assessment, the designer should be ready to write the performance goal and objectives for the course. These are the performance measures that will help guide the development of the course by focusing training efforts on the desired outcome. Pfeifer says in *Mastering the Instruction Design Process* that "writing performance objectives is the second most important duty of instruction designers -following the needs assessment" (p. 151). It was also noted in Bohlander and Snell's *Managing Human Resources* that "a clear statement of instructional objectives will provide a sound basis for choosing your teaching methods and materials" (p. 240).

Craig taught me to write my course goal first, followed by the detailed performance objectives. The goal was designed to specifically state what the learners would be able to do upon completion of the course, and how their learning would be measured. Below is the goal I wrote for the "Powerful Presentations" course I developed at Micron.

"Participants will be able to demonstrate the use of proper presenting techniques by developing and delivering a ten minute presentation"

The performance objectives were then written to specifically detail how participants were going to achieve the goal. Here are the performance objectives for the "Powerful Presentations" course:

Participants will be able to:

- Describe the principles of powerful presentations.
- Define the characteristics of powerful presenters.
- Describe the steps involved in organizing and developing a presentation.
- Discuss the importance of visual aids.
- Demonstrate the use of proper presenting techniques.

After the goal and objectives are written, the designer will need to decide how they are going to layout the class to take the learner from where they are...to where they need to be. In other words, in what order should the objectives be placed, what resources are going to be needed, what group exercises should be used, what examples should be shared, and what type of visual aids will be needed.

"Powerful Presentations" was the first course I developed working under Craig. It was truly an honor to be asked to develop and facilitate it because it was one of the most needed courses by Micron's managers and executives. It was a little intimidating at first to know that I was going to be presenting to the "top dogs" of the organization.

Craig had completed the assessment so I knew what was needed; I just wasn't sure how I would put it all together. After I developed the goal and objectives it took me a few days to decide how the course was going to look. Then it hit me.. .as most people know, getting in front of a group has been rated one

of the ten worst human fears in the United States. It was when I developed the class -and according to Chris Bonney, a speech and communication professor at EOU -it still is. So I designed the class to follow the process of a storm. I've included a copy of the participant guide for your review, but here's what I came up with:

**Part 1-The Storm Brews** Principles of a Powerful Presentation

**Part 2-Lightening Strikes** Anxiety Ten Worst Human Fears in the U.S Reducing Anxiety

**Part 3-Ceasine; a Disaster** Eight Steps to a Powerful Presentation

Developing Your Objective

Analyze Your Audience Structure the Presentation

Powerful Introductions

Tell'em Model

Using Visuals Modality

**Part 4-Every Cloud Has a Silver Lining** Presenting with Pizzazz

Appearance

Posture

V.E.G.A's

The design phase is another critical phase. If you simply design a class that consists of nothing but lecture, your participants will not only be bored, but they most likely will not retain everything you are saying. It is imperative for the designer to make the class as interesting as possible by including visual aids, proper examples, and exercises that target all learning styles.

## **Development**

The development phase should come fairly easy if you have completed the design phase appropriately. This is really the material preparation phase. The designer should be creating the visual aids, learning manuals, and any other materials by following the goal and objectives that were defined in the design phase. ASTD recommends that you check, check and recheck all of your materials to detect any errors. It's funny, because I spent at least a month developing "Powerful Presentations" and had several people proof my materials, but in reviewing the participant guide today I'm still finding mistakes!

At Micron we had fairly advanced technology available at our finger tips most of the time. We had up-to-date computers and software, and multimedia projectors in all of our training rooms. So when developing a course I typically created a PowerPoint presentation, a participant guide, and instructor manual. The only difference between the participant guide and instructor manual is the instructor manual contained the instructor's talking points. I typically developed the PowerPoint presentation and instructor manual simultaneously. Doing this made room for less error. Once the instructor manual was complete, I would develop the participant guide. The participant guide should contain most of the information included in the PowerPoint presentation. This will allow the learner to see the content twice, and hear the instructor say it aloud. Retention of the material will be made easier this way.

The "Powerful Presentation" course was designed to be completed in eight hours. However, I only facilitated it in two hour increments to allow the learners to "digest" the information they were receiving, and to give them time to prepare their final ten minute presentation. After all of the material was produced and I felt I was ready to roll, I presented my final product to Craig and my co-workers. This gave my peers a chance to view the overall package and provide suggestions for additional content, group exercises, or visual aids. Once the test phase was complete and approved by Craig, I was ready to knock the socks off my first group of managers and executives.

## **Implementation**

According to ASTD's Handbook, "In any organization there [can be] numerous sources of resistance to new ideas or new ways of doing things. So the transition from a completed product to implementation can be difficult" (p. 279). However, this was not the case for us at Micron. We conducted our needs assessments and only developed classes that were truly needed. Once we confirmed the need, we had free reign to implement new courses, as long as Craig previewed them first. The course was always offered first to the specific group that the needs assessment was conducted on, and then it was put on our course list and opened up to anyone else that wanted to attend.

The other piece to the implementation phase is making sure that there is more than one instructor trained on how to facilitate the course. Furthermore, the course must continually be reviewed and evaluated to determine if any revisions need to be made. Craig always ensured that there was a primary and secondary instructor for every class we offered. The secondary instructor was required to be up to par on all aspects of the class at all times.

## **Evaluation**

The evaluation phase should be a continuous process. Every time the class is facilitated it should be evaluated by the participants, as well as the facilitator. However, the first evaluation is probably going to be the most influential. As the ASTD Handbook states, "the evaluation phase is designed to provide feedback on

- How participants react to an instructional program.
- The extent to which participants improve knowledge and skill.
- The extent to which on-the-job behavior is changed or skills are transferred to the work setting.
- The final result that occurred because of participation" (p. 280).

Craig insisted that evaluation sheets be handed out to every participant after every class we facilitated. This gave him a way of measuring our performance, as well as a way for us to evaluate our classes. We designed an evaluation sheet as a team that allowed participants to evaluate the content of the course, how well the instructor knew the material being presented, how well the instructor presented the material, and if the room conditions were appropriate for their learning - "5" being the best, and "1" being the worst.

This is the final phase of the ADDIE model. If done thoroughly and correctly, the entire process can take months to complete. It is imperative for an instructional designer to incorporate each step systematically to ensure proper development of a course.

## **Summary**

My experience as an Associate Trainer/Training Specialist has given me substantial experience in instructional design. Through research and experience I have learned some important aspects of adult education, how to develop a course following the ADDIE model, and how to facilitate a course using proper presentation techniques. Working in this field has truly polished me as a professional. Public speaking is no longer my #1 fear, and I feel as though I have the skills and abilities to develop and facilitate any training course, provided I have access to the appropriate resources.

## **Credit Request**



In this essay I have demonstrated my understanding of instructional design principles, and how I have applied them in developing courses of my own. With the experience I gained in the three years I spent working in this field, as well as my accomplishments achieved, I respectfully request ten elective credits in Education: Instructional Design. Thank you for your time and consideration.

### **Annotated Bibliography**

American Society of Training and Development, About ASTD,  
<http://www.astd.org/ASTD/AboutASTD> [online] 5/9/2007.

This is an excellent resource for teachers and trainers. It gives up-to-date information on instructional design research that has been done, as well as current resources that are available.

Bohlander, George and Scott Snell, (2004). *Managing Human Resources*, Mason, OH. South-Western. This is a textbook that was geared more towards the overall aspects of human resource management. It contained only a small piece of information about training and development. It did include, however, an instructional design model similar to the ADDIE model. However, it's not a resource I would recommend for other instructional designers.

Craig, R.L., (1996). *American Society of Training and Development Handbook*, New York, NY. McGraw-Hill.

I know the APEL video instructed us to not use handbooks, but if you've ever seen the ASTD Handbook you'd know that it's not just an ordinary handbook. It's like the Bible of instructional design. I couldn't help but use this as a reference because it's the main resource I used when working as an Associate Trainer/Training Specialist. I would definitely recommend all instructional designers to buy their own copy!

eLearningspace, *Instructional Design Models*,  
<http://www.elearningspace.org/Articles/InstructionalDesign.htm> [online] 5/23/2007.

This site provided some basic information about instructional design, as well as a variety of types of instructional design models. I included this list of models in the index.

The Instructional Design Exchange, *Who Crafted the ADDIE Model*,  
<http://idxchange.blogspot.com/2005/05/who-crafted-addie-model.html> [online] 5/2/2007].

I used this site only as a means to find the history behind the ADDIE model. It didn't provide any other information that I found useful.

The International Board of Standards for Training, Performance, and Instruction (IBSTPI)  
<http://www.ibstpi.org/Competencies/instructiondesigncompetencies.htm> [online] 5/16/2007.

This is an extremely valuable online resource for instructional designers. It provides an abundance of current resources regarding instructional design and training and development. It is a recommended bookmark for anyone in this field.

Pfeiffer, J.B, (1998), *Mastering the Instructional Design Process*, San Francisco, CA. A Wiley Company.

This was a rather dry book, but it did provide some valuable information. I found that it provided just about the same information as the ASTD Handbook, however, it just laid it out differently. I'd rather use the ASTD Handbook if had my choice.