

Don't Give Up the Portfolio: Paradigms in Formative Assessment

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ABSTRACT: The character and goal of seminary formation is missionary and evangelistic in all its forms and requires personal and communal accompaniment as its means. This Innovation Grant project proposed the development of an integrated online formation portfolio for the formative and summative assessment of students preparing for ordained ministry.

The famous battle flag which flew over the USS Niagara during the 1813 Battle of Lake Erie stated, “Don’t Give Up the Ship”—a definitive declaration on the essential nature of the sailing vessel for a military victory. While theological education and formation are not battles to be won, there are some similarities regarding the formation portfolio as an essential tool of formative and summative assessment which should not be given up by theological schools today.

Before sending out his first disciples Jesus called them together and asked them, “Who do you say that I am?” (Luke 9:20). The disciple’s answers shaped and formed their understanding of Jesus’ mission, and their own identity as missionary disciples. In a similar way today, Jesus continues to form disciples in His identity and prepares them to be sent out on mission. Those in ministry formation are “disciples on a journey, constantly needing an integrated formation, understood as a continuous configuration to the identity of Jesus Christ.” (*Ratio Fundamentalis*, Intro.). This integrated formation is lived out in four dimensions—human, spiritual, intellectual, and pastoral and require as their foundation a personal and communal accompaniment and “a single and integrated path” (*Ratio Fundamentalis*, 53).

The *ATS Innovation Grant* project showed that the integrated formation path for student accompaniment is a formation portfolio which allows for applying theology with a view toward developing the habit of reflecting on human experience from the perspective of faith. Accompanying students using the essential tool of portfolios resulted in greater integration of the four dimensions of priestly formation through the methods of *getting proximate, changing the narrative, and encouraging hope*, leading to a pastoral empowerment of students that reflected the vigor of the early Church (*vigorem Ecclesiae*). (Figure 1)

Integrated Formation Portfolio

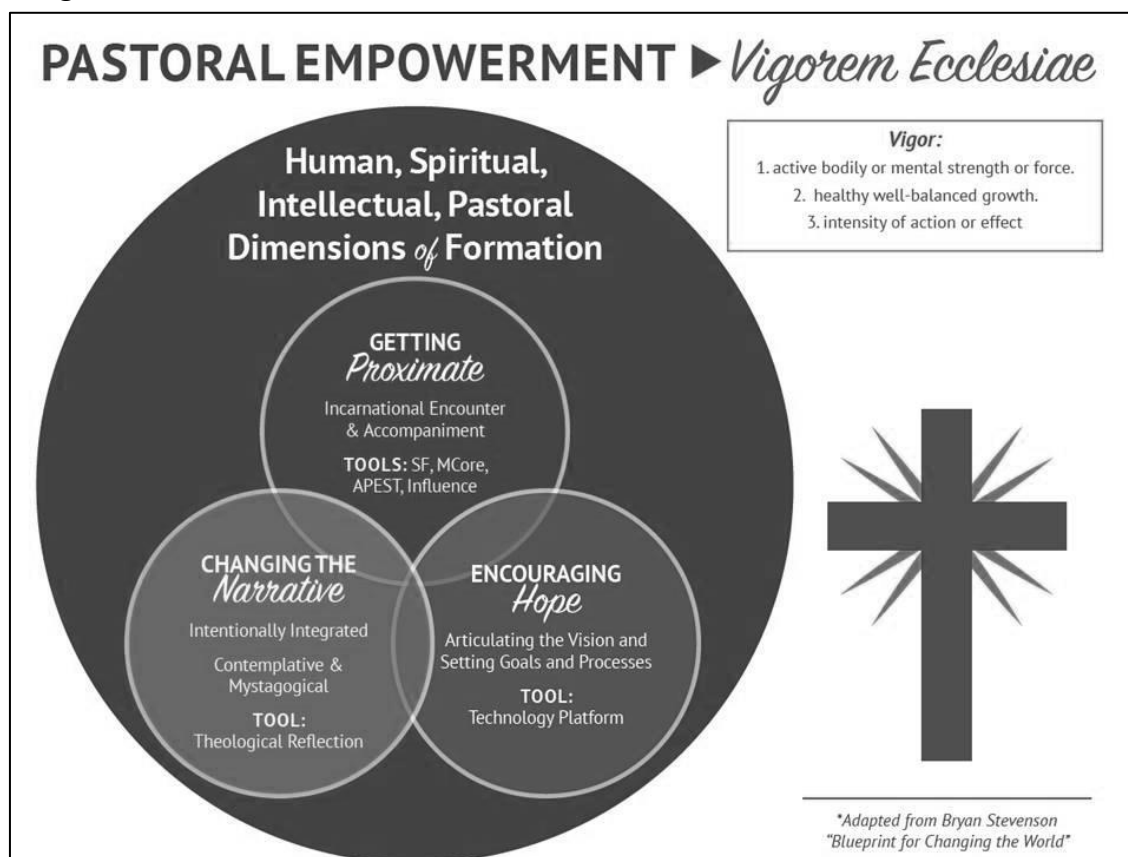


Figure 1: The integration of the four dimensions of formation requires a three-fold process of proximity, narrative reflection, and accompaniment which leads to the students to a pastoral empowerment that reflects the vigor of the early Church.

The primary goals of the *ATS Innovation Grant* project also connected to the five institutional convictions which permeate every aspect of the learning community at Saint Mary Seminary, and are the desired outcomes of all the degree programs:

1. *Formation:* to effectively use new media for a comprehensive assessment to promote personal, professional, and ministerial growth
2. *Christian Discipleship:* to appropriately integrate theological reflection using new media into one's personal development and to acquire skills for ministry;
3. *Theological Thinking:* to enhance student theological reflection using appropriate technologies to promote skills of analysis and critical reflection;
4. *Communication:* to encourage productivity and professional practice through the use of technologies;
5. *Collaboration:* to model and assess the potential of mobile technologies to enhance interpersonal skills, facilitate collaboration in ministry, and encourage the formation of community.

Formative and Summative Assessment Tool

The *ATS Innovation Grant* supported the collaborative design and development of a custom-built online formation portfolio which assists each student in being a “protagonist of his own formation” (*Ratio Fundamentalis*, 130). According to the *ATS Standards*, it is tool which demonstrates, through direct and indirect evidence, the achievement of the goals and learning outcomes of the Master of Divinity (M.Div.) program (Standard A.1.3.1). As a repository of formative evidence, the tool integrates the four dimensions of priestly formation through personal and spiritual goal setting, quantitative and qualitative assessment of M.Div. capstone evidence, and pastoral theological reflections.

This innovative portfolio is similar to a dynamic online file cabinet with the capacity to hold file drawers for every student in the formation program. Each file drawer represents an individual student, and within the drawer are folders with the student's learning outcomes for each year of formation. Each file drawer is password protected with access granted only to designated students and faculty. Students can access their online file drawer through a profile page which contains personal information based on their progression through the program.

Each year students, faculty, field education supervisors, and collaborators in ministry can submit evidence of the student’s achievement towards personal goals and institutional outcomes, for example:

- Weekly evidence of formational integration through pastoral theological reflections.
- Weekly quantitative and qualitative formational assessment by faculty and supervisors.
- Yearly summative evaluations by faculty, supervisors, peers, and laity.

Standards of Accreditation data can also be analyzed in a summative way across the entire formation process, from the pastoral pre-assessment to the final evidence of outcome achievement during the terminal year of formation (Standard A.1.4.1). Unlike pre-packaged learning management systems, this innovative design allows students and faculty to visually track progress toward accomplishing growth goals, competencies, and learning outcomes. When a student falls behind in outcome growth, timely feedback can coach them toward specific resources to support their individualized learning (Figure 2).

Formative and Summative Assessment Process

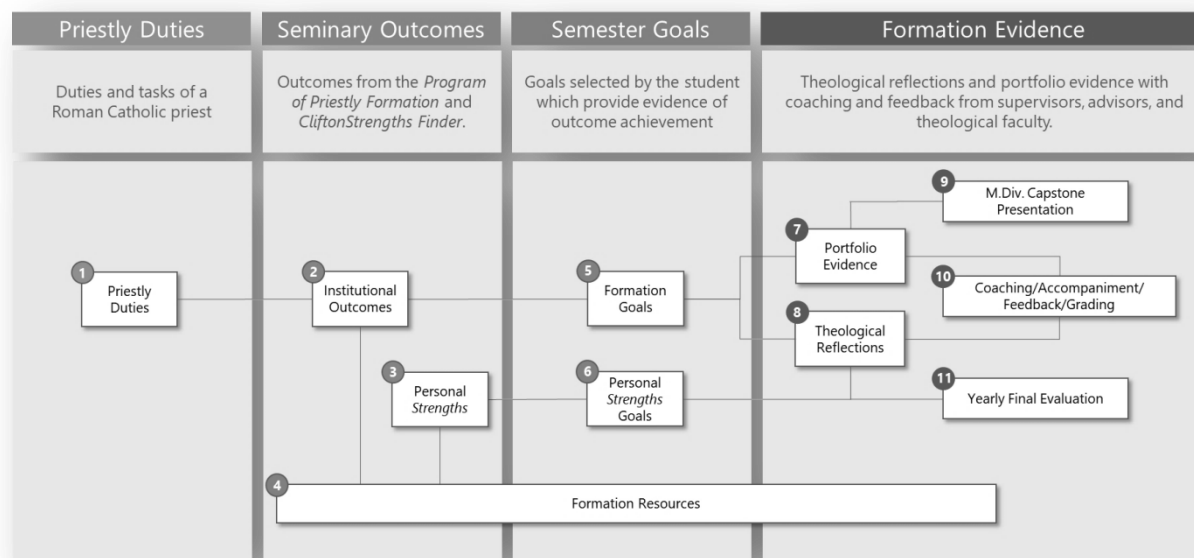


Figure 2: Direct and indirect evidence of the student’s ability to complete the duties and tasks of a Roman Catholic priest based on the completion of formation goals connected to institutional outcomes.

Students input evidence of their achievement of the institutional outcomes into the portfolio and invite faculty and supervisors to review their evidence throughout the formation process. In their final year of seminary formation students offer a summative assessment of their learning through a M.Div. capstone presentation. Data from the capstone presentation highlights areas of accomplishment, needed ongoing formation, and provides the student an online resume to assist in their transition into full-time ministry.

Assessing Proficiency of Formation Outcomes

One of the crucial challenges faced by the seminary faculty before the *ATS Innovation Grant* project was a consistent method of collecting direct and indirect evidence of the students’ accomplishment of institutional outcomes and overall proficiency in the duties and tasks of a diocesan priest. The seminary faculty consulted decades of best-practice research on the duties and tasks of diocesan priests and collaborated in the development of the integrated portfolio.

The comprehensive assessment, *In Fulfillment of Their Mission: The Duties and Tasks of a Roman Catholic Priest* published in 2008 by the *National Catholic Educational Association* assisted the seminary faculty in connecting priestly duties with sample performance metrics of newly ordained priests. Taking these performance metrics, the faculty linked them to the institutional outcomes based on the year in which the specific outcome would be addressed.

For example, *In Fulfillment of Their Mission* lists a total of nine priestly duties and seventy-three individual tasks for a Roman Catholic priest and Saint Mary Seminary lists twenty-eight institutional outcomes on its evaluation standards for the M.Div. program.

The nine duties of a Roman Catholic priest according to *In Fulfillment of Their Mission* are:

1. Celebrates liturgy and Sacraments
2. Provides pastoral care and spiritual guidance
3. Teaches the Faith
4. Leads parish administration
5. Practices a ministry of presence
6. Participates in the life of the diocesan church
7. Engages with diverse publics
8. Engages in professional development
9. Engages in personal development

In Fulfillment of Their Mission then identifies several tasks under each of the nine duties. For example, tasks listed under the fifth duty, “Practices a ministry of presence,” are:

1. Demonstrates appropriate etiquette, social graces, and skills
2. Greets people before and after liturgies and events
3. Displays good listening skills
4. Displays humility and a non-judgmental attitude

Saint Mary Seminary has twenty-eight institutional outcomes which were linked to one or more of the seventy-three priestly tasks. Four outcomes related to the task, “Demonstrates appropriate etiquette, social graces and skills” are:

1. Adheres to professional and ethical norms of conduct for ministry
2. Shows evidence of self-knowledge, self-discipline, and emotional self-control
3. Demonstrates qualities of courtesy and affability
4. Receives and integrates constructive criticism

Finally, from these duties, tasks, and institutional outcomes, a rubric was created which offers students, faculty, and supervisors a concise way of gauging growth in proficiency on a four-tier scale: 1) below proficiency; 2) approaching proficiency; 3) proficiency; 4) above proficiency (Figure 3).

Proficiency in Institutional Outcomes

LEVEL 1 (Below Proficiency)	LEVEL 2 (Approaching Proficiency)	LEVEL 3 (Proficiency)	LEVEL 4 (Proficiency+)	Sample Formation Resources
No evidence of self-knowledge and self-control; Alcohol abuse or use of illegal narcotics; Public displays of anger. Consistently late with assignments; Overtly flirtatious or romantic behavior	Identifies the distinction between loneliness and solitude; Generally displays a contented demeanor; Timely for appointments	Appreciates solitude and contemplation; Regularly engages in physical exercise; Maintains a tidy work and living space	Demonstrates self-knowledge about his feelings and emotions but is not controlled by emotions; Engages socially with diverse relationships	1. Strength Finder or similar personal assessment tool 2. Professional psychological counseling 3. TED talks on emotional intelligence topics

Figure 3: Rubric demonstrating a duty and task of a Roman Catholic priest linked to the proficiency tiers of an institutional outcome (Standard A.1.4.1).

Seminary faculty also contributed references to sample formation resources, such as published texts, videos, and online materials, to assist students in the attainment of proficiency. As a student selects individual outcomes to address, they can access the resources to help guide their formation.

Saint Mary Seminary is unique among Roman Catholic seminaries in the United States in that since 2012 it has intentionally integrated advanced technologies into its program. With this newest innovation project, Saint Mary Seminary has observed evidence of increased personal productivity, enrichment of the educational experience through greater access to resources and experts, and promotion of active engagement and collaboration in the learning process. This project in particular has demonstrated a new paradigm in integration of formation through technology which has helped the seminary fulfill its mission of preparing seminarians for the pastoral challenges they will encounter in ordained ministry.

Integrating Human Formation: An Unexpected Innovation

Over the past four years each student entering Saint Mary Seminary has completed the Catholic version of the *CliftonStrengths* assessment called *Living Your Strengths*. Based on decades of research by the Gallup Organization, the assessment identifies an individual's unique talents which are the naturally recurring patterns of thought, feeling and behavior that can be productively applied to one's vocation. These natural talents can be turned into *Strengths* through practice and coaching. Students who can apply their *Strengths* in formation and ministry are more likely to experience joy of being used fully by God. In addition, students who recognize and collaborate with each other's *Strengths* can more easily see their classmates as "wonderfully and uniquely made" (Psalm 139:14).

An unexpected and innovative idea emerged through this project when it was suggested that the online formation platform combine the student's individual top five signature *Strengths* themes

with goals that relate to the institutional outcomes. Because God often uses both our strengths and our weaknesses, Scripture passages and goals were developed to assist students in using their strengths and redeeming their weaknesses (Figure 3).

Strengths Themes and Goals

Strengths	Description	Scripture	Formation Goal
Achiever	People exceptionally talented in the Achiever theme work hard and possess a great deal of stamina. They take immense satisfaction in being busy and productive.	James 2:14-17 1 Thes 5:12-13 Proverbs 18:9 Hebrews 6:11-12	Self-Initiation: Take advantage of your self-motivation by setting challenging formation goals. Set a more ambitious goal every time you finish an assignment or project.
Activator	People exceptionally talented in the Activator theme can make things happen by turning thoughts into action. They are often impatient.	James 1:22-23 Ecclesiastes 11:4-6 John 13:17	Trust in God: Balance your intensity for action by focusing on the importance of relationships and trusting in God's timing.

Figure 3: Two *Strengths* themes with definitions, Scriptures, and formation goals.

Lessons Learned: Quantitative Assessment of Formation

One of the development challenges in the *ATS Innovation Grant* project was creating quantifiable metrics which demonstrated a student's formational integration. Insights offered during the biennial conference for the Catholic Association of Theological Field Educators (CATFE) identified four areas: student-advisor *engagement*; pastoral *risk-taking*; deeper theological *insight*; and growth in ministerial *effort*.

For example, the dynamic nature of the new portfolio allows for faculty and supervisor quantitative and qualitative assessment when a student goes beyond their comfort zone in a pastoral situation. While the result of the student's effort may not meet total proficiency, the student's overall effort and willingness to take a risk can be affirmed. Since previous portfolio evidence frequently focused only on the achievement of goals and outcomes, the new system has shown to encourage "failure adverse" students to take more calculated risks in ministry.

After a year of using the new portfolio, students showed an increase in their willingness to take pastoral risks in ministry, receiving an average assessment score of 3.8 out of a five-point scale.

A significant lesson learned was the effectiveness of using theological reflection as the primary method of accompaniment and assessment within the formation portfolio. Theological reflection is a huge component in helping a student to discover more of who they are, and allowing for their authenticity, integrity, and faithfulness in ministry (Floding, *Engage: A Theological Field Education Toolkit*, 35). A dynamic portfolio offers a greater transparency of student's theological reflections for faculty and supervisors. In addition, those responsible for the student's formation

can offer immediate qualitative and quantitative feedback. This timely feedback assists the student in identifying goal and outcome achievements in the midst of their ministry instead of waiting for the summative evaluation at the end of the grading period.

It was decided by the faculty that portfolios offer an action-reflection model of learning which provide: timely evidence of a student's formative growth; opportunities for one-on-one faculty and supervisor accompaniment in person or from a distance; and, a summative predictor of future pastoral ministry.

While some theological institutions and seminaries are choosing to abandon portfolios due to the extensive effort required to coordinate large amounts of evaluative information, the paradigm of an integrated online portfolio offers a reason not to give up. As one faculty member stated at the conclusion of a training session:

Students today are digital natives so an integrated online portfolio is an essential tool for closing the loop in assessment of theological education and formation.

This statement confirms the shifting trends in formation program delivery and evaluation which are more effectively meeting the needs of theological students in the 21st century seminary.

Ongoing Culture of Innovation

This *Innovation Grant* project continued the mission of priestly formation for the digital generation, and is a project of excellence for Saint Mary Seminary. The commitment and cooperation of the administration and faculty assures the continued sustainability of this technology initiative in the following ways:

- 1) *Seminary Graduates:* The seminary meets periodically with graduates to review the success of their proficiency and ministry integration.
- 2) *Faculty and Supervisors:* Consultation between the faculty and the field education supervisors provides useful feedback for program evidence, resources, and overall improvement.
- 3) *Ongoing Formation:* The formation portfolio is being expanded for use by all the ordained clergy of the Diocese of Cleveland to assist with ongoing formation in ministry.

In addition to sustaining the current project, efforts to provide updated technology for students and supervisors caught in the “digital divide” were addressed through the purchase of ten iPad tablets. Since new technology can be complex, continued professional development and coaching will be provided to students and faculty through yearly workshops and professional-development programs.

As the President-Rector of Saint Mary Seminary stated, “New technologies offer the possibility for preaching the Gospel and promoting genuine encounter in theological formation. This project will continue to build on the existing technology culture in the seminary and to strengthen and further expand the power of mobile technology for formation, evaluation, and assessment at the graduate level.”

Project Timeline and Ongoing Assessment

The *Innovation Grant* was more than a “project.” Not only was it one more step in the integration of the four dimensions seminary formation, but it will also be used to impact the ongoing pastoral formation for the life of the priest. Going forward, the focus of the Seminary will be on the assessment of seminarians as they transition into ordained priesthood and full-time pastoral ministry. A key metric will be their happiness and satisfaction in ministry as they use a redeveloped portfolio for their ongoing formation.

Msgr. Stephen Rossetti’s seminal research in, *Why Priests are Happy: A Study of the Psychological and Spiritual Health of Priests*, provides several factors which contribute to the high-rate of happiness and satisfaction reported by priests. The report states:

When you ask a priest about his own morale and happiness as a priest, I believe that he digs down deeper. While being very conscious of the current difficulties and pains, a priest thinks about deeper things where he assesses his own morale. He thinks about his relationship to God and to his brother priests and to the people. He thinks about his daily sacramental and ministerial life. He thinks about being with the people and being a part of their lives. When he looks at the core of priesthood and assesses its essence, he realizes that he likes being a priest and doing what a priest does (Rosetti, 91).

Of the twenty-one factors that Rossetti correlated with happiness and morale, the highest factors related to a priest’s relationship with God, with the Bishop, with friends, and with brother priests (Rossetti, 101). These factors will serve as the baseline for the direct and indirect assessment of the continued integration of their lives.

Direct measures will primarily include pre and post-assessments of their happiness at the beginning of their priesthood and throughout key transitions in their priestly life (i.e. assignment changes, becoming a pastor, mid-career ministry, retirement). Indirect measurements will include yearly cohort ratings which gather information on how priests relate their strengths, motivations, and gifts for ministry as they use the integration tool.

June 2017	Innovative Design Sessions
July 2017 – April 2018	Accomplished Design and Development Goals
January 25-28, 2018	Catholic Association of Theological Field Educators (CATFE) Peer-Review Presentation
May 16, 2018	Faculty Development Workshop & Program Start Date
May 2018 – May 2019	Portfolio Implementation & Assessment
June 2019 – Ongoing	Continued Seminary Implementation and Development of Ongoing Formation Portfolio for Pastoral Ministry

Additional Resources

Essential to the success of the *Innovation Grant* was the collaborative partnership with Moreland Connect, the custom software development company that created the online integrated portfolio platform. The company worked to understand the goals and objectives of the project, and provided proper staffing and processes to build the system on time and within budget. In addition, the company continued to offer technical assistance beyond the scope of the initial contract so as to assure complete product satisfaction.

Additional information about Moreland Connect and the online integrated portfolio can be found at www.percorso.app/learnmore or by contacting Mr. Jeff Kavlick at: jeff.kavlick@morelandconnect.com

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