

EDUCATOR PORTFOLIO TEMPLATE

INSTRUCTIONS

This tool is a template for creating a **developmental Educator Portfolio (EP)**. It is designed to help you plan and reflect upon your career as an educator. **It is not intended to be submitted as a document for a promotion review.** At the University of Arizona College of Medicine (UACOM), promotion on most of the new faculty tracks requires documentation of Education Scholarship. The promotion packet at UACOM includes a Promotion C.V. and Personal Statement, which require descriptive and reflective entries to provide proof of educational scholarship and involvement. The information that you collect systematically, using this template, will provide all the information you require to prepare your formal promotion package. The Academy of Medical Education Scholars at UACOM has adapted an EP template originally created by Maryellen Gusic, MD; Latha Chandran, MD, MPH; Constance Baldwin, PhD; Dorene Balmer, PhD; and Donna D'Alessandro, MD.; and the Ambulatory Pediatric Association's Educational Scholars Program Curriculum Planning Task Force, and released for public use by academic institutions through the MedEd Portal.

Your EP is an **individual** record of your strengths and innovations in your educational efforts. It should reflect your personal skills, accomplishments and efforts in the area of educational scholarship. Therefore, 1) complete **ONLY** those parts that pertain to your educational activities, and 2) plan to modify your EP, with addition of new sections, over time (e.g., yearly). This is what makes it a developmental EP.

The EP will help you document your major teaching activities and their results. The **purpose of this activity** is threefold:

1. A developmental EP will help you gain a broad perspective on your educational activities, plan strategically, track your evolution as an educator over time, and reflect on your experiences.
2. Your EP is a critical tool to help you achieve promotion and advancement as an educator. All educators need to learn how to plan and "market" their work, so they can attain status and visibility among their academic peers.
3. At UACOM, your EP, along with your CV, will be a key source of information on your career as an educator. It will document the quality of your educational contributions, so your peers can judge the institutional value of your work and its importance in the broader field of education.

Your developmental EP will be invaluable when used as a tool to create your promotional material, when the time arrives. It can be used to apply for promotion/tenure, new jobs, teaching awards, or educational grants. For these applications, you will probably want to add a summary of each EP section.

Keeping your EP current and complete is highly recommended, so you have a trustworthy master file of all your work to choose from when you want to create a promotional EP for a specific purpose. We recommend a yearly revision of your EP. Many important documents (e.g. learner and peer evaluations) will exist nowhere except in this personal file that describes your work.

WRITING THE COMPONENTS OF THE PORTFOLIO

EDUCATIONAL PHILOSOPHY STATEMENT

In a short, concise paragraph (500 words or less), describe your approach to education and the principles that underlie your teaching. For example, you might discuss

- your personal theory of learning
- characteristics of a good teacher and a good learner that you currently/wish to emulate
- your view of the roles, responsibilities, and impact of students and teachers
- how your ideals align to the College of Medicine and your Department
- factors that promote or impede your effectiveness as an educator.

This statement should spring from careful reflection on your educational strengths and weaknesses. Illustrate your principles with examples from your own teaching, to show how they are related and have evolved over time.

YOUR FIVE-YEAR GOALS AS AN EDUCATOR

This list might include both aspirations for achievement and plans for learning and growth, ideally linked together. Keep the list brief and focused. Consider discussing your goals with your mentor(s).

REVISION OF YOUR PHILOSOPHY AND GOALS OVER TIME

As you develop your EP over the years, your philosophy statement and goals list offer a good opportunity to reflect on the distribution, quality and quantity of your educational activities and contributions. This reflection might include examining your philosophy in relation to the evidence of your educational efforts, and considering ways to enhance your scholarly productivity and impact.

DOMAINS OF AN EDUCATOR PORTFOLIO

Each domain of your EP will help you collect and collate your experiences, while helping you record critical data that will be useful in the preparation of your promotion packet. **Instructions** for each domain are listed either below or within the section. After the data entry portion of each section, you will be asked to create a **narrative paragraph** summarizing your accomplishments and performance. This is a good place to reflect on any educational scholarship that you are involved in with regard to each of those domains.

I. TEACHING

Possible Information for this section:

- Background or needs assessment
- Learning Objectives
- Educational Strategies or methods
- Preparation of materials
- Documentation of learner outcomes
- Self-reflection of strengths and weaknesses

Medical educators teach in many venues, to a variety of audiences, using a variety of techniques. Frequently, educators perform these tasks and consider them “add-ons” to our real work, rather than valuable contributions to our institutions and communities. Use this section to document/track your teaching/training activities. Don’t forget to keep track of: lectures, PBL, CME talks, precepting in clinical areas, community forums, etc. Frequently, clinical teaching is under-reported, since it is hard to quantify. However, describe each activity as well as you can, and estimate the amount of time spent.

II. ASSESSMENT OF LEARNERS

Anytime you are responsible for assessing a learner, you should describe that activity here. Examples of learner assessment include Case-Based Instruction Facilitator evaluations of medical students and Clinical rotation performance assessments. Retain blank copies of these assessment forms to attach in an Appendix to this portfolio.

III. CURRICULUM DEVELOPMENT

Possible Information for this section:

- Background or needs assessment
- Learning Objectives
- Educational Strategies or methods
- Preparation of materials
- Documentation of learner outcomes
- Self-reflection of strengths and weaknesses

IV. MENTORING AND ADVISING

Possible Information for this section:

- Formal advisees and current status
- Informal advisees (those you help who are not formally under your wing)
- Examples of advisee work (publications, grants, research projects)
- Placement or positions of advisees after graduation

During the course of your career, you will undoubtedly have the responsibility of being advisor and mentor to many students, residents, fellows, and junior faculty. Although a rewarding part of your job, this is a time-consuming commitment. For each advisee, list the name of advisee, period of advising and time commitment/year, advisee's position or level of training (e.g. MPH candidate, MSIII, PGYII), Mentoring topic (e.g. career development, research project title) and Outcome for advisee (e.g. manuscript published, grant funded, graduated/promoted.)

V. EDUCATIONAL LEADERSHIP AND ADMINISTRATION

Administration

Possible Information for this section:

- Appointment to committees
- Reports to committees
- Taskforce assignments
- Reports for accreditation review
- Program evaluations and your role
- Specify: departmental, institutional, organizational, regional, national, etc.

Medical educators are often called upon to perform administrative duties. Many of these relate to educational activities: examples are service as course directors, clerkship directors, curriculum coordinators, and education committee members. Medical educators are also often called upon to provide medical leadership and effort for program development and education-related committees. This is a critical function for institutions, yet the time commitment frequently is under-recognized. Use this section to document your administrative responsibilities and provide evidence of your competence in this area. For each entry, list the name of activity, distribution of impact (e.g. regional, international),

duration of role and estimated time commitment. Don't forget to include extramural activities such as:

- Community Outreach/Advocacy
- Media Presentations
- Health Fairs
- Patient education presentations or materials developed outside of paid clinical setting
- Telemedicine
- Charity events and your role (volunteer or coordinator)
- Service Projects

VI. SCHOLARLY APPROACH TO EDUCATION

VII. PRODUCTS OF EDUCATIONAL SCHOLARSHIP

Each of these components is likely to be included in the portfolio of a veteran teacher, but you are unlikely to develop activities in all areas from the start of your career. Complete only those parts that are relevant to your work.

Your EP should convey to reviewers the **quantity, quality, impact and scholarly nature** of your educational work. Look through the template and decide in which sections your past and current educational activities belong. You may compile information for all sections, or concentrate on one or two areas.

The final two domains on the EP, **Scholarly Approach to Education** and **Products of Educational Scholarship**, are particularly important in decision-making about academic promotions. Scholarship is relevant to all parts of the EP. For each domain, you should address all relevant educational scholarship as this will be a key portion of eventual promotion packet. If your EP does not address educational scholarship, think about how to develop this critical part of your career in the future.

This template is designed for you to update your EP on a regular basis. As you work on your EP, **think about any new areas you would like to be able to add to it over the next five years**. This reflection will help you refine your five-year goals.

EDUCATOR PORTFOLIO TEMPLATE

NAME:

Date of last update:

TITLE(S):

PRIMARY EDUCATIONAL ROLE(S):

STATEMENT OF EDUCATIONAL PHILOSOPHY

(short, concise paragraph, 250-500 words)

YOUR FIVE-YEAR GOALS AS AN EDUCATOR

After reviewing the EP Template, list up to 5 carefully considered goals for your development as an educator in the next 5 years, and be sure that your educational activities, as they evolves over time, address these goals. Your professional development goals should be accompanied by learning strategies to help you achieve them.

Date of last update:

- 1.
- 2.
- 3.
- 4.
- 5.

(Revise or add goals with each EP update.)

DESCRIPTION OF YOUR EDUCATIONAL CONTRIBUTIONS

SECTION I: TEACHING

Description of Your Teaching Activities

In addition to lectures, include teaching that encourages active learning, e.g. interactive lectures, small group sessions, workshops, and clinical precepting. PLEASE FOLLOW THE EXAMPLE BELOW IN COMPLETING THIS GRID. ACCURATE NUMBERS FOR **LEARNERS** AND **HOURS** ARE IMPORTANT.

Teaching Activities Grid

Activ #	Year(s) Taught*	Title or topic of activity	Teaching strategy and context (include pre-clinical vs. clinical)	Where taught (local, reg, nat'l, internat'l)	Total teaching hours/yr for this activity	Type of learner	Number of learners/year for each activity**
1							
2							
3							
4							
Grand Total							

* If your institution requires specific dates, add these.

** If there are a variable number of learners at an activity, provide an average number.

For the following narrative responses, you may wish to choose 1-2 focal areas of teaching for more detailed comment:

Describe the importance, creativity, innovation, and impact of the teaching activities included on the grid above (identify by Activity Number).

Evaluation of Your Teaching

Provide information below on your teaching evaluations for each course/setting in which you teach (referring to the Activity Numbers from the Teaching Activities Grid, if appropriate). Save each evaluation in a file which will become an Appendix to your Portfolio, and refer to highlights of that evaluation here, rather than using the entire document.

Teaching Evaluation Grid

Activity number	Who and how many evaluated you? (e.g., 25 learners, 2 peers or educational experts)	Describe the process for evaluating your teaching	List evaluations/ evaluation summaries included in Appendix XX:

Summarize this teaching evaluation data:

If available, provide data on how your teaching evaluations compare to those of your peers (e.g. personal mean score vs. mean scores of other departmental faculty).

What do you do to collect formative feedback on your teaching (e.g. do you solicit verbal peer-review or use a standardized peer-review form?)

Teaching Awards

Please list any teaching awards that you have received, with dates and sponsoring institution/organization. Indicate if the award is departmental, institutional, regional, national or international, and describe briefly, including the criterion on which the award is based.

Teaching Awards Grid

Name	Date Received	Sponsoring organization	Level of award Departmental/Institutional/Regional /National/ International	Criterion for award (peer vs. student selected, honor-based)

I. Overview of Section I

These questions refer to your teaching activities and should help guide your creation of a reflective narrative.

1. How did the information obtained through your teaching activities and their evaluation change your educational practice?
2. Describe evidence that your teaching activities have been developed using a scholarly approach. (For ideas, review Glassick's article, *Acad. Med.* 2000;75:877–880. See listing of criteria in Section VI.).
3. Describe any products of educational scholarship that were peer reviewed, presented or published, or adopted for use in other programs as a result of your teaching activities. This is superb evidence of educational scholarship.

Reflective Narrative:

SECTION II: ASSESSMENT OF LEARNERS

Describe on the grid below the learner assessment methods you employ (use Activity Numbers from the Teaching Activities Grid, if appropriate.) You may evaluate learners in a setting where you do not teach (e.g. OSCEs). Each assessment method should be listed only once, not repetitively for each course or conference.

Learner Assessment Grid

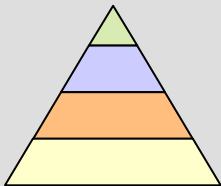
Assessment Method	Teaching activity number	Context of assessment	Your role Development of new tool, implementation of existing tool, analysis/synthesis of results	Number and types of learners assessed per year	In what category of Miller's Triangle does this assessment fall?*	How did the results of your learner assessments provide evidence of your teaching effectiveness?

* Miller's Triangle is shown below.

Learner assessment tools included in Appendix XX:

- 1
- 2
- 3

Miller's Triangle



Does: Chart audit, portfolio, direct observation (masked/unmasked), also patient outcomes

Shows how: High fidelity simulation, OSCE

Knows how: Case Presentations, Low fidelity simulations

Knows: Multiple-choice question examination

Miller, GE. *Acad Med*, 65(supp); Sept 1990

A CAVEAT: Not all learning is amenable to this kind of concrete evaluation. For example, developing professional skills such as taking responsibility, empowering team members, or being sensitive to patient's cultural values, are important but not easy to demonstrate or document. Evaluations that are restricted to observable or measurable behaviors may overlook important aspects of physician performance that are best evaluated qualitatively.

Overview of Section II (These questions should help guide your creation of a reflective narrative.)

1. How did the information obtained through your learner assessment activities change your educational practice?
2. Describe evidence that your assessment tools were developed using a scholarly approach. (For ideas, review Glassick's article, *Acad. Med.* 2000;75:877–880. See listing of criteria in Section VI.)
3. Describe any products of educational scholarship that were peer reviewed, presented or published, or adopted for use in other programs as a result of your learner assessment activities.

Reflective Narrative:

SECTION III: CURRICULUM DEVELOPMENT

Curriculum Information Grid

Activity number	Curriculum topic and type (e.g. clerkship module, residency longit experience, fellowship research component)	Type and # of learners per yr	Is it implemented? (Yes/No)	Where is it implemented? (dept, instit, regional, national, international)	Your degree of responsibility (leader or contributor)

GNOME FRAMEWORK FOR QUALITY OF CURRICULAR DESIGN*

Choose one curriculum above as an example of your *best effort*, and describe this one using the GNOME framework.

Curricular Activity selected (Activity number) _____

The GNOME Framework: Indicators of Quality

- **Goals and Objectives:** The goals are appropriate in scope, objectives are specific and measurable
- **Needs assessment of learners:** Curricular design uses learner needs assessment to choose and refine goals and objectives and instructional methods, uses learner assessment data to refine needs assessment
- **Teaching /Learning Methods:** Curricular design includes variety of methods that address educational goals, are aligned with objectives and meets needs of diverse learners in specific educational settings
- **Learner Assessment and Feedback:** Curricular design includes valid reliable feasible and appropriate learner assessment methods. Incorporates formative feedback in design
- **Curriculum/Program Evaluation:** Curriculum is evaluated periodically using valid reliable, feasible and appropriate evaluation tools and modified based on the results of such evaluation

Description:

Overview of Section III (These questions should help guide your creation of a reflective narrative.)

1. How did the information obtained through your curricular development activities change your educational practice?
2. Describe evidence that your curricular development activities have been developed using scholarly approach. (For ideas, review Glassick's article, Acad. Med. 2000;75:877-880. See listing of criteria in Section VI.)
3. Describe any products of educational scholarship that were peer reviewed, presented or published, or adopted for use in other programs as a result of your curricular development activities.

Reflective Narrative:

SECTION IV: MENTORING AND ADVISING

Description of your Mentoring and Advising Activities

Mentoring and Advising Grid

Name of mentee or advisee	Period of mentoring/ advising; Time/year	Their position when you were their mentor or advisor	Mentoring Topic	Their current position	Mentee achievements, if applicable (Grant funded, Manuscript published, Graduated, etc.)

Describe your mentoring philosophy and the process by which you typically mentor junior professionals:

Overview of Section IV. (These questions should help guide your creation of a reflective narrative.)

1. How did the information obtained through your mentoring and advising activities and their evaluation change your educational practice?
2. Describe evidence that your mentoring and advising activities have been developed using a scholarly approach. (For ideas, review Glassick's article, *Acad. Med.* 2000;75:877–880. See listing of criteria in Section VI.)
3. Describe any products of educational scholarship that were peer reviewed, presented or published, or adopted for use in other programs as a result of your mentoring and advising activities.

Reflective Narrative:

SECTION V: EDUCATIONAL LEADERSHIP AND ADMINISTRATION

Description of Educational Leadership and Administrative Activities

Examples of past or present leadership roles in education include fellowship/residency/clerkship director or associate director, site director, continuity clinic director, leader of an education subcommittee/curriculum committee, project director on a training grant, and director of a faculty development program. Document your depth of involvement and your role in such programs using the grid below. Identify if you were elected to the position, and by whom.

Leadership/Administration Grid

	Level of program/course or committee Departmental/Institutional /Regional/National/International	Role; Duration and Time commitment/year
Program/course(s) that you have directed		
1.		
2.		
3.		
Program/course(s) which you have been a member of		
4.		
5.		
6.		
Education-related committee(s) which you have led		
7.		
8.		
9.		
Education-related committee(s) on which you have been a member		
10.		
11.		
12.		

Choose **ONE program** as an example of your best effort and provide a narrative description of the program and its impact, and evidence of scholarly approach to this role/task:

Results of evaluation of **your ROLE** by outside agencies (e.g., ACGME, LCME, NBME, funding agencies)

List of stakeholders for whom letters are appended (e.g., institutional/departmental leaders, learners, peers, community partners):

- 1
- 2
- 3
- 4

Professional Reviewer/Moderator Activities* Grid

Activity number	What was reviewed /moderated (Grants, papers, abstracts)	Duration of activity in years	Sponsoring organization/institution/agency

* Include activities at the NATIONAL level only

Overview of Section V (These questions should help guide your creation of a reflective narrative.)

1. How did the information obtained through your leadership and administration activities and their evaluation change your educational practice?
2. Describe evidence that your leadership and administration activities have been developed using a scholarly approach. (For ideas, review Glassick's article, Acad. Med. 2000;75:877-880. See listing of criteria in Section VI.)
3. Describe any products of educational scholarship that were peer reviewed, presented or published, or adopted for use in other programs as a result of your leadership and administration activities.

Reflective Narrative:

NOTE ON SECTIONS VI AND VII

Sections VI and VII on scholarly approach to education and products of educational scholarship are *vital* important to promotion as an educator. Although you have included relevant information about your scholarly work under each domain, these two sections allow you to **highlight your scholarly approach** and **compile all products of educational scholarship**, so they are easily accessible for peer review.

SECTION VI: Scholarly Approach to Education

Evidence of a scholarly approach to education

A scholarly approach to education is reflected by

- how one undertakes one's own development as an educator
- evidence of one's consistent use of accepted principles and standards for planning and designing educational activities

To complete this section for the first time, review your information in **Domains I - V** above, and consider the primary focus of your educational activities. This area can provide the centerpiece of Section VI.

Focal activity that demonstrates a scholarly approach _____

Describe this activity in 1-2 pages, providing evidence of:

- Application of sound principles and systematic planning, such as Glassick's criteria (see below)
- Use of "best practices" or an accepted model from literature or recognized experts
- Use of reflective practice to improve the project or activity

Continuing Professional Development in Education

List in the grid below any education-based conferences, certification or degree programs, or other educational professional development activities that you have attended. **Include ONLY those that have made a significant impact on your philosophy or practice as an educator.** Examples include CME courses and faculty development sessions. Also, identify any such activities that you developed or presented to instruct others in the art of teaching or other educational activities.

Professional Development in Education Grid

Name of Program	Sponsoring organization or institution	Type of program Education Degree, Educational Professional Development Program, Educational Conference of > one day, Educational Workshop	Dates, Time spent	Description of Activity or Program; Did you develop, lead or participate in the program?

Choose ONE activity above to describe its impact on your practice as an educator:

SECTION VII: PRODUCTS OF EDUCATIONAL SCHOLARSHIP

Publications Related to Education

Provide list with full references. Do not include clinical or basic science research publications. Include for each item listed:

- Article Book Other(specify)_____
- Peer reviewed Invited Non peer reviewed

- Full reference
- Impact factor of journal
- Citation data (how often the publication has been cited, if available)

Workshops and Peer-reviewed/Invited Presentations on Educational Topics

Provide a list with full references. Do not include presentations whose purpose is to report on or teach about clinical or basic science research; include only presentations about education. Provide data for each item listed on:

- Workshop Didactic presentation Poster Other(specify)_____
- Invited Peer reviewed Non peer reviewed
- National/international Regional Institutional Departmental

- Title
- Where presented
- Audience

Other educational products

- Description of product
- Venue of dissemination
 National/international Regional Institutional Departmental
- Evidence of dissemination

Educational grants funded

List grants and provide for each item listed:

- Title
- Your role
- Funding source
 National/international Regional Institutional Departmental
- Total direct costs (all years)
- Dates of funding
- Description of project