EDUCATOR PORTFOLIO: INSTRUCTIONS

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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 <u>not</u> intended to be submitted as a "high stakes" EP for a promotion review.** The precise format, length, and content of a formal EP differ from institution to institution. Typically, a high stakes EP is considerably shorter than a developmental EP, and includes more summarized information. However, the information that you collect systematically, using this template, will provide all the information normally required for an EP to accompany a formal promotion package.

Your EP is an **<u>individual</u>** statement of the strengths of and innovations in your educational efforts. It should reflect your personal skills and accomplishments. 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 following websites include ideas, examples, and references:**
>
> http://www.mcw.edu/display/router.asp?docid=2546
> http://www.med.ufl.edu/oea/opfd/faculty/sts/portfolio.shtml
> http://www.mcg.edu/som/pandt/educatorportfolio.htm
> http://deptmed.med.som.jhmi.edu/faculty/body11.html
> http://www.med.umich.edu/medschool/faculty/portfolio.htm

An Educator Portfolio (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. For your institution, 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 employers 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 high stakes EP, 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 or the EP as a whole.

Keeping your EP <u>current</u> and <u>complete</u> is highly recommended, so you have a trustworthy master file of all your work to choose from, when you want to create a high stakes EP for a specific purpose. We recommend a yearly revision of your EP. Many important documents (e.g. learner and peer evaluations) will exist no where except in this personal file that describes your work.

Educator Portfolios are not used at every institution, and they are still a "work in progress" at a national level, so we expect to make improvements in this developmental EP template over time. **We welcome your suggestions for improvement:** contact Constance Baldwin, email: constance_baldwin@urmc.rochester.edu.

WRITING THE COMPONENTS OF THE PORTFOLIO

EDUCATIONAL PHILOSOPHY STATEMENT
In 1-2 pages, 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, your view of the roles and responsibilities of students and teachers, the aims of instruction and how these might change under different conditions, or environmental factors that promote or impede learning. This statement should spring from careful reflection on your educational strengths and practice. Illustrate your principles with examples from your own teaching, to show how they are related.

If you find this statement is difficult to write, look at examples on some of the websites listed on the previous page.

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).

DESCRIPTION OF YOUR EDUCATIONAL CONTRIBUTIONS: (include some or all five parts)
  I. **TEACHING**
  II. **CURRICULUM DEVELOPMENT**
  III. **MENTORING/ADVISING**
  IV. **EDUCATIONAL LEADERSHIP/ADMINISTRATION**
  V. **OTHER INFORMATION**

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. If necessary, invent a new category to fully describe all your major educational contributions. No two careers are identical.

Your EP should convey to reviewers the **quantity, quality, 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 page of this template provides a **systematic approach to describing scholarship in education** that can be used to complete any of the five components of the template. Use whatever parts apply to your work. 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:

TITLE(S):

PRIMARY EDUCATIONAL ROLE(S):

STATEMENT OF EDUCATIONAL PHILOSOPHY
Insert here, length 1-2 pages

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 EP, as it evolves over time, addresses 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

I.1. Description of Your Teaching Activities

In addition to lectures, include teaching that encourages active learning, e.g. interactive lectures, small group sessions, workshops (any location), 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	Where taught (local, reg, nat, internat'l)	Total teaching hours/yr for this activity	Type of learner	Number learners/year for each activity**
1							
2							
3							
4							
Grand Total							

* If your institution requires specific dates, add these.
** If there is 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).

Example of Teaching Activities Grid

Activity Number	Title or topic of activity	Teaching strategy	Where taught (local, reg, nat, internat'l)	Total teaching hours/yr	Type of learner	# of learners in a year
1	Lecture on Rashes	Repeated lecture in the med student clerkship	department	1 hour every 8 weeks= 6 **hours per year**	Medical student	20 learners
2	Workshop on Career Advancement	Workshop as part of Faculty Development Program series	institution	4 workshops/yr @ 3 hr each = **12 hrs /yr**	Faculty affiliated with med school	70 learners
3	Pediatric Inpatient Rotation	Family-centered rounds with bedside teaching, teaching at delivery attendance, admissions, ED consults and pediatric stabilizations	department	On service about 150 days/yr @ 4 hr/day= **600 hr/yr**	Family medicine residents and 4th year medical students	4 learners
4	Educator Portfolio Workshop for Junior Faculty	Workshop with interactive small groups	national	**3 hrs/yr**	Mid level, junior faculty, fellows	**30 learners**
Grand Total				**621 hrs/yr**		**124 learners/yr**

I.2. Assessment of Learner Outcomes:

Describe on the grid below the learner assessment methods you employ (refer to 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 (Activ # if applicable)	Title or topic of activity	Evaluation context (e.g., # and type of learners, frequency of activity)	Your role in learner evaluation: development implementation analysis/synthesis	Evaluation methods and process	In what category of Miller's Triangle does this evaluation fall?*	How did the results of your learner assessments provide evidence of your teaching effectiveness?

* See Example of Grid and Miller's Triangle below. Other models of evaluation may be used if preferred.

For the following narrative responses, you may wish to choose 1-2 of the above types of learner assessment for more detailed comment:

Referring by Activity number to the grid above, describe below your role in learner evaluation (development, implementation, analysis/synthesis):

Referring by Activity number to the grid above, describe below the process, method, and category (Miller) of evaluation you employed.

Learner evaluation tools included in Appendix XX:
1
2
3

Referring by Activity number to the grid above, summarize results of evaluation of learners:

What did you learn from your evaluation of learners?

How did this information change your educational practice?

Example of Learner Assessment Grid

Assessment Method (Activ # if applicable)	Title of topic of activity	Evaluation context (e.g., # and type of learners, frequency of activity)	Your role in learner evaluation: development implementation analysis/synthesis	Evaluation / feedback methods and process	In what category of Miller's Triangle does this evaluation fall?	How did the results of your learner assessments provide evidence of your teaching effectiveness?
1	Medicine in Contemporary Society	Four years of medical school, required, all students (n=410 over 4 yrs)	Development Analysis	OSCE with an SP dealing with a medico-legal case	Shows how	99% of students passed the "test," suggesting that course met its goals
4	Clerkship	2 students, 1x/mo= 24 students/yr	Implementation	Observe students do H&P, provide 1-on-1 feedback	Does	With feedback, most students achieve competence in history and physical examination skills at the level expected for a third year medical student.

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.

I.3. 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).

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 means scores of other departmental faculty).

What do you do to collect formative feedback on your teaching?

What did you learn from evaluation and feedback on your teaching?

How did this information change your educational practice?

I.4. Overview of Section I

These questions refer to both your teaching activities and your assessment of learners (I.1, I.2, and I.3).

Describe evidence that your teaching or your learner evaluations have been developed using a scholarly approach (For ideas, review Glassick's article, Acad. Med. 2000;75:877–880).

Describe any scholarly products that were presented or published, or adopted for use in other programs, as a result of your teaching or learner assessments: (see **Standardized Template For Reporting Educational Scholarship**)

Use the space below to share any reflections on teaching or learner assessment activities that are not covered above:

SECTION II: CURRICULUM DEVELOPMENT

II. 1. Curriculum Information

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

GNOME ANALYSIS OF CURRICULUM			
GNOME* Elements	**Element included? Y/N**	**Indicators of Quality**	**Evidence of Quality**
Activity number			
Goals/objectives		Goals are approp in scope; objectives are specific and measurable/evaluable	
Learner needs assessment		Curr design uses learner needs assessment to choose and refine G/O and methods; use learner eval data to refine needs assessment	
Teaching/learning methods		Curr design includes variety of methods that address educ goals, and meet needs of diverse learners in specific educational settings	
Learner evaluation and feedback		Curr design includes sound learner evaluation methods (valid, reliable, feasible)	
Curriculum/program evaluation		Curriculum is modified periodically using results of learner and program evaluations	
Activity number			
Goals/objectives		See above	
Learner needs assessment		See above	

Teaching/learning methods		See above	
Learner evaluation and feedback		See above	
Curriculum/program evaluation		See above	
For more activities, duplicate 6 lines above			

* **GNOME:** G = Goals, N = Needs, O = Objectives, M = Methods, E = Evaluation

Please add additional narrative details or comments if you wish:

EXAMPLE OF CURRICULUM DESCRIPTION					
Activity number	**Curriculum topic and type** (e.g. clerkship module, residency longit experience, fellowship research component)	**Type and # of learners per yr**	**Is it imple-mented?** (Yes/No)	**Where is it implemented?** (dept, instit, regional, national, intern'l)	**Your degree of responsibility** (leader or contributor)
1	Seminar series (4x1.5 hr) on academic writing	10 gen peds and adol med fellows/ year	Yes	Dept	Development leader and instructor

EXAMPLE OF GNOME ANALYSIS OF A CURRICULUM			
GNOME* Elements	**Element included? Y/N**	**Indicators of Quality**	**Evidence of Quality**
Activity Number 1			
Goals/objectives	Y	Goals are approp in scope; objectives are specific and measurable/evaluable	I have written educational goals and objectives for the fellowship in area of scientific communications, based on my extensive practice as a writing instructor for faculty and fellows. Selected objectives were basis of seminar curriculum.
Learner needs assessment	Y	Curr design uses learner needs assessment to choose and refine G/O and methods; use learner eval data to refine needs assessment	Fellows participated in selection of focal goals; I selected objectives based on my knowledge of fellows writing needs (personal mentoring of Gen Peds fellows and junior faculty). Discussion by fellows helped to guide focus of each seminar.
Teaching/learning methods	Y	Curr design includes variety of methods that address educ goals, and meet needs	Methods include didactic presentation, extensive use of authentic examples with interactive discussion, practice with feedback, and distribution of individual practice

		of diverse learners in specific educational settings	materials for post-seminar reinforcement.
Learner evaluation and feedback	Y	Curr design includes sound learner evaluation methods (valid, reliable, feasible)	All fellows receive mentoring on their written products (abstracts, papers, grant proposals), with extensive feedback from 2-3 or more faculty on evolving documents. Final evaluation is the peer review system itself. An objective system for analyzing learners' written products in relation to specific seminar objectives is under development.
Curriculum/program evaluation	Y	Curriculum is modified periodically using eval results	Seminar evaluations, as well as learner comments during and after the class, are carefully reviewed with every iteration to improve the seminar.

II. 2. Overview of Section II

Describe evidence that your curricula were developed using a scholarly approach. (For ideas, review Glassick's article, Acad. Med. 2000;75:877–880).

Describe any scholarly products that were presented or published, or adopted for use in other programs, as a result of your curriculum development activities: (see **Standardized Template For Reporting Educational Scholarship**)

Use the space below to share any reflections on curriculum development that are not covered above:

SECTION III: MENTORING/ADVISING

III. 1. Description of your Mentoring and Advising Activities

Mentoring and Advising Grid

Name of mentee or advisee	Dates of mentoring/ advising	Number of years you invested in relationship	Their role/position during the time you were their mentor/advisor	Your role and what you taught them	Their current position	Their significant achievements*

* E.g., papers, awards, grants, promotions, leadership positions. Attach a list if needed.

In 1-2 pages, describe your mentoring philosophy and the process by which you typically mentor junior professionals:

List of mentees from whom letters are appended:

1
2
3
4

III. 2. Overview of Section III.

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).

Describe any scholarly products which were presented or published, or adopted for use in other programs, as a result of your mentoring and advising activities: (see **Standardized Template For Reporting Educational Scholarship**)

Use the space below to share any reflections on mentoring and advising activities that are not covered above:

SECTION IV: EDUCATIONAL LEADERSHIP/ADMINISTRATION

IV. 1. Description of Educational Leadership and Administrative Activities

Answer the questions separately for each program you lead or have led. You may refer to previous sections of the EP if appropriate. Examples of 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, director of a faculty development program.

LEADERSHIP AND MEMBERSHIP ROLES				
Title of program/course(s) that you direct	**Dept/ Instit'l**	**Regional**	**National/ Internat'l**	**Duration in years**
1.				
2.				
3.				
Name of educational committee(s) that you lead				
4.				
5.				
6.				
Name of educational committee(s) on which you are a member				
7.				
8.				
9.				

Narrative description of the program and its impact (refer to table by activity number):

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

IV. 2. Overview of Section IV

Describe evidence that your educational leadership or administrative activities have been developed using a scholarly approach: (For ideas, review Glassick's article, Acad. Med. 2000;75:877–880).

Describe any scholarly products which were presented or published, or adopted for use in other programs, as a result of your educational leadership or administrative activities: (see **Standardized Template For Reporting Educational Scholarship**)

Use the space below to share any reflections on educational leadership or administrative activities that are not covered above:

SECTION V: OTHER INFORMATION

V. 1. Professional Reviewer/Moderator Activities at the National Level

Activity number	What was reviewed/moderated (Grants, papers, abstracts)	Year/s of review or moderating	Sponsoring organization/institution/agency

Describe the impact of these activities on your philosophy or practice as an educator (identify by activity number).

V. 2. Educational grants funded

Title

Your role

Funding source (name):

❑ National/international   ❑ Regional   ❑ Dept/institutional

Total direct costs (all years)

Dates of funding

Description of project

v. 3. Education Awards/ Honorable Mentions

List, indicate if award is international/national/regional/institutional/departmental and describe briefly.

V. 4. Publications and Scholarly Products Related to Education

Provide list with full citations. See **Standardized Template For Reporting Educational Scholarship** for information to include. Do not include clinical or basic science research publications.

V.5. Workshops and Peer-reviewed/Invited Presentations on Educational Topics

Provide a list with full citations. See **Standardized Template For Reporting Educational Scholarship** for information to include. Do not include presentations whose purpose is to report on or teach about clinical or basic science research; include only presentations about education. Include presentation location: departmental, institutional, regional, national or international audience.

V. 6. Professional Development in Education

List in the grid below any conferences, certification or degree programs, or other educational professional development activities that you have attended as a learner (not a teacher). **Include ONLY those which have made a significant impact on your philosophy or practice as an educator**. [A more comprehensive list should be included in your curriculum vitae.]

Activity Number	Name and Description (include duration, e.g. 3 hrs, 1 day, 1 month)	Dates and Location	Sponsoring organization/institution

Describe the impact of each development activity on your philosophy or practice as an educator (identify by activity number).

STANDARDIZED TEMPLATE FOR REPORTING EDUCATIONAL SCHOLARSHIP
(For use in any section of the EP)

Publications:

Type: Letter to editor, case report, case series, review article, original article

Invited or peer reviewed?

Where published:

Impact factor of journal (if available)

Citation data (if available)

Presentations:

Type: Workshop, long or short platform presentation, poster, other

Invited or peer reviewed?

Where presented:

Purpose of the presentation:

Evidence of disseminated use of the product:

Description of product

Where was it adopted?
Other departments within institution
Other institutions

Evidence of how it was adopted

Glassick's six criteria for a scholarly approach/scholarship (Acad. Med. 2000;75:877–880) provide a useful structure for systematic description of an educational activity:

1. **Clear goals:** stated purpose, realistic objectives, important questions
2. **Adequate preparation:** understanding of literature, appropriate skills, needed resources
3. **Appropriate methods:** choice of methods that match goals, effective use and flexible application of methods
4. **Significant results:** goals are achieved, results are important, field is advanced
5. **Effective presentation:** presentation well organized, forums appropriate, message clear and sound
6. **Reflective critique:** work critically evaluated, supported with good evidence, evaluation used to improve future studies