Building an Educator Portfolio

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Learning Objectives

- Identify the content and uses of an educator portfolio (EP)
- Describe the qualitative and quantitative components needed to fully document one’s educational efforts and their impact
- Use the UFCOM EP template for documenting one’s own educational activities
- Analyze key sections of sample EPs and discuss the value of this information in the evaluation of educators
With thanks to Connie Baldwin PhD, Maryellen Gusic MD, and Latha Chandran MD MPH
What is the value of an educator portfolio?
Promotion of Educators is a Challenge

• 315% increase in clinician educators in academic medicine in the last 20 years
• New promotion tracks for clinician educators have been widely adopted
• A 2004 study* at Johns Hopkins found that the odds of being at higher rank were 69% lower for clinician educators than for basic scientists, after adjustment for:
  • Age and gender
  • Time at rank
  • Global work satisfaction score

Why does this occur?

- Are educators under-developed as academicians?
- Do they lack good mentors?
- Do they lack financial support for scholarship?
- Is their time sufficiently protected for scholarship?
- Is their contribution to the quality of future physicians valued?
One Well-Documented Explanation

Promotion and retention of educators requires accepted standards to evaluate performance

- Promotions committees are unfamiliar with educational scholarship
- Educational “credits” are more difficult to document than research “credits”
- CVs fail to document education adequately
- Educator Portfolios lack a widely accepted, standardized format
Curriculum Vitae vs. Educator Portfolio

- CV mainly documents educational quantity: IF the format is modified to report educational activities systematically

- EP shows quantity, quality and impact: creativity, innovation, evidence-based approach, strong learner outcomes, adoption of models by other programs
### Developmental vs. Promotional EPs

<table>
<thead>
<tr>
<th>Developmental</th>
<th>Promotional</th>
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</thead>
<tbody>
<tr>
<td>Formative purpose</td>
<td>Summative purpose</td>
</tr>
<tr>
<td>Comprehensive scope</td>
<td>Focused, brief</td>
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<tr>
<td>Primary consumer – self &amp; mentor</td>
<td>Primary consumer – senior decision makers</td>
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**Uses:**

- Career planning
- Stimulate reflection
- Share work with mentors
- Provide raw material for promotional EP

**Uses:**

- Showcase top achievements
- Establish merit for promotion
Key Components of UFCOM EP

• Excellence in Teaching
• Excellence in Educational Scholarship
• Contribution to Academic Excellence
• Educational Leadership and Service
How is excellent teaching defined?

- **Quantity**: learners, hours, effort
- **Quality**:
  - Content and methods: authenticity, variety, depth
  - Best practices and sound planning
  - Demonstrated excellence through:
    - Direct observation (by peers or experts)
    - Assessments of learner performance
    - Teaching evaluations by learners
- **Impact**
  - Geographic dissemination, long-term outcomes of learners, patient outcomes
Excellence in Teaching

- Documentation of high level of teaching involvement and evaluation by learners and peers
  - Letter from education supervisor (scope of teaching, evidence of creativity, major accomplishments, use of varied methods, responsiveness to feedback)
  - Learner evaluations with peer comparisons (include discussion about context, with emphasis on area of major assignment)
  - Learner outcomes
  - Peer evaluations
- Teaching awards and honors, with descriptions of criteria and scope
Activity #1
Teaching Activities

- Complete the Teaching Activities Grid for your own teaching
Large Group Reflection

• Review the sample EP

• What are its strengths and weaknesses?

• How could you enhance the impact of your own teaching activities section/grid?
What is educational scholarship?

“Three Ps” criteria:

- Public dissemination
- Peer review
- Providing a Platform for others to build on

These require careful documentation – which doesn’t happen automatically!
Glassick’s Criteria for Excellence in Scholarship

1. **Clear goals**: stated purpose, realistic objectives, important questions
2. **Adequate preparation**: understanding of literature, appropriate skills, needed resources
3. **Appropriate methods**: methods 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
6. **Reflective critique**: work critically evaluated, supported with good evidence, evaluation used to improve future studies

Glassick CE. Boyer’s Expanded Definition of Scholarship, the Standards for Assessing Scholarship and the Elusiveness of the Scholarship of Teaching. *Academic Medicine* 2000;75:877-880
Excellence in Educational Scholarship

- Scholarship examples:
  - Peer-reviewed manuscripts about education
  - Peer-reviewed educational materials
  - Curricula
  - Book chapters addressing topics in education
  - Regional or national paper, abstract or poster presentations on medical education
  - Regional or national workshops on medical education
Excellence in Educational Scholarship

- Evidence of national recognition:
  - Invited talks at national/international meetings and other institutions
  - Selection to serve on national accrediting and licensing organizations or clinical specialty education committees
  - Journal editorial board selection
  - Grant review committees for national organizations
Contribution to Academic Excellence

- Serving as a resident advisor
- Counseling a learner with difficulty
- Speaking at a “career night” or involvement in discipline-specific student interest groups
- Performing peer evaluations
- Mentoring activities within and outside of the department/institution
- Participation in workshops or presentations on mentoring
Educational Leadership and Service

- Developing or revising curriculum
- Participation on educational committees
- Participation in educational CME, including workshops
- Attending regional and national education meetings
- Seeking peer evaluation
- Development of specific assessment tools
- Use of a variety of pedagogical and assessment methods and tools
- Evidence of effective curriculum or program development and assessment
Educational Leadership and Service

- Educational administrative positions
- Active participation in national or international committees or organizations dealing with education
- Reviewer of educational awards
- Service as editor or reviewer of educational submission for journal or meeting
- Participation in faculty development in medical education
- Additional training in education
- Wards for educational programs, curricula, or projects
Applying an Accepted Curriculum Development Model

G = Goals
N = Needs
O = Objectives
M = Methods
E = Evaluation

Use of Quantitative Data to Show Effort and Impact

- Faculty member’s role
- Implementation status
- Number of learners
- Geographic distribution/use
Use of Qualitative Data to Show Effort and Impact

- Goals appropriate in scope
- Objectives specific and measurable
- Curricular design uses needs assessment to choose and refine G&Os and methods
- Use of learner assessment data to refine needs assessment
- Curriculum uses variety of methods that address educational goals
- Curricular design includes sound learner assessment methods
- Curriculum modified periodically using evaluation results
Activity #2
Curriculum Development

- Divide into pairs

- How does the narrative information help to demonstrate quality and impact of this curriculum?

- What could the educator do to increase the impact of his/her work in this domain?
Scholarly Approach to Learner Assessment

- Going beyond the conventions of one’s institution
- Assessing learner needs before teaching
- Assessing attainment of learning objectives after teaching
- Using authoritative sources for new methods
Miller’s Triangle: A Model for Learner Assessment

- **Does**: Chart audit, portfolio, direct observation, patient outcomes
- **Shows how**: High fidelity simulations, OSCEs
- **Knows how**: Case presentations, low fidelity simulations
- **Knows**: Multiple choice exams

Miller, GE. The Assessment of Clinical Skills/Competency/Performance, Academic Medicine, 1990; 65(9): S63-67
Activity #3
Learner Assessment

- Large group exercise

- Apply Glassick’s criteria to this example of learner assessment
  - Does it meet the criteria of scholarly approach?
  - Does it achieve the goal of scholarship?
Activity #4
Personal Reflection and Planning

- Reflect on one of your current educational projects that has potential for further development
- Write down your commitment to plan for scholarly activity that you can add to this project over the next 6 months
- Write down 1 – 2 specific scholarship goals for this project
- What are the 2 most useful ideas that you learned from this workshop that you want to remember?