The Educator Portfolio:
An Essential Component of Your Promotion Dossier

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Learning Objectives

By the end of this session engaged participants will be able to:

1. Explain the value of the Educator Portfolio (EP) for documenting achievements in education
2. List the essential components of the EP
3. Envision how to organize and build their personal EP using existing resources
4. Distinguish a developmental EP from a promotional EP

Conflicts of Interest

None

The Educator Portfolio (EP)

- Describes and details the strengths of your teaching and educational innovations.

- Complements the CV with comprehensive information tracking your career as an educator.

- Measures the scope, quantity, and quality of your educational contributions.

- Organizes information using established terminology that translates across academic institutions.

- Permits judgment about the institutional value of your work and its importance to the broader field of education.

- Encourages reflection upon personal skills and accomplishments.

Baldwin CD, Gusic M, Chandran L. The Educator Portolio: A Tool for Career Development. AAMC Group on Faculty Affairs.
https://www.aamc.org/members/gfa/faculty_vitae/148574/educator_portfolio

EP Components

- Educational philosophy statement
- 5-year goals as an educator
- Educational contributions in any/all:
  1. Teaching
  2. Learner Assessment
  3. Curriculum Development
  4. Mentoring and Advising
  5. Educational Leadership and Administration

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Standards of Excellence in Scholarship

Clear goals (SMART**)**
Adequate preparation (lit review, resources)
Appropriate methods (matching goals**)**
Important results (advancing field)
Effective presentation
Reflective critique (use of critical evaluation to improve)

Glassick CE. Boyer's Expanded Definitions of Scholarship, the Standards for Assessing Scholarship, and the Elusiveness of the Scholarship of Teaching. Acad Med. 2000;75(9):877-880.

Applying Standards to EP

Standard	Examples for EPs
Clear goals (SMART)	• Teaching module with clear goals addressing specific needs • Hypothesis-based educational research
Adequate preparation (lit review, resources)	• Education driven by prior assessment of learners • Use of best practices in curriculum dev • Faculty development preceding teaching

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Applying Standards to EP

Standard	Examples for EPs
Appropriate methods (matching goals)	• Teaching/learning methods that suit a variety of learning styles • Teaching methods that maximize the educational potential of a clinical setting • Performance-based learner assessments
Important results (advancing field)	• Strong learner outcomes from valid and reliable evaluations • Published papers • Adoption of models by other institutions

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Applying Standards to EP

Standard	Examples for EPs
Effective presentation	• Successful workshops, oral presentations • Peer-reviewed publications, grants • Garnering institutional support for new programs
Reflective critique (use of critical evaluation to improve)	• Thoughtful response to one's teaching assessments • Review of evaluation data from new curriculum to plan refinement • Review of learner assessments to guide program improvement

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EP Template (UCSF): **Teaching**

ROLE: Teaching (classroom or clinical)	
Name: Name (Click to enter text)	**Department:** Department
1. Name your teaching activity(ies): Identify the impactful activity(ies) you select to focus on.	
Name your teaching activity(ies)	
2. Your role(s): Describe your role(s) and specifically what you contribute.	
Your role(s)	
3. Learners and amount of contact: Describe types, levels and numbers of learners; amount of contact you have with them.	
Learners and amount of contact	
4. Builds on best practice/evidence: Describe your preparation including the use of best practice and evidence where available, your professional development, and/or congruence with national, curriculum, and/or program goals.	
Builds on best practice/evidence	
5. Goals and learning objectives: List goals and <u>learning objectives</u> of program. If these are extensive, provide just a few illustrative examples.	
Goals and learning objectives of program	
6. Methods: Describe the methods used for instruction, how these align with objectives, and rationale for choices.	
Methods	
7. Results and impact: Describe evidence of learner ratings of teaching, learning outcomes, application of knowledge in other settings at UCSF, impact on educational programs within the institution, and/or teaching awards. <u>Comparison data is required</u>.	
Results and impact	
8. Dissemination: Describe how your efforts have been recognized by others externally through peer review, dissemination, use by others, or teaching awards nationally.	
Dissemination	
9. Reflective critique: Describe your reflections, what went well and plans for improvement.	
Reflective critique	

https://meded.ucsf.edu/faculty-educators/educators-portfolio

EP Template (UCSF): **Mentoring & Advising**

ROLE: Mentoring and Advising	
Name: Name (Click to enter text)	**Department:** Department
1. Name your mentoring and/or advising role(s) or activity(ies):	
Name your activity(ies)	
2. Your role(s): Describe your role(s) and specifically what you contribute.	
Your role(s)	
3. Mentees and amount of contact: Describe types, levels and numbers of mentees; amount of contact you have with them.	
Mentees and amount of contact	
4. Builds on best practice/evidence: Describe your preparation including the use of best practice and evidence where available, your professional development, and/or congruence with national, curriculum, and/or program goals.	
Builds on best practice/evidence	
5. Goals and learning objectives: List goals and <u>learning objectives</u> of program and/or individual mentees. If these are extensive, provide just a few illustrative examples.	
Goals and learning objectives of program and/or mentees	
6. Methods: Describe the methods used for instruction, how these align with objectives, and rationale for choices.	
Methods	
7. Results and impact: Describe evidence of mentee ratings for mentoring, learning outcomes, career trajectories, impact on educational programs, and/or mentoring awards.	
Results and impact	
8. Dissemination: Describe how your efforts have been recognized by others externally through peer review, dissemination, use by others, or mentoring awards nationally.	
Dissemination	
9. Reflective critique: Describe your reflections, what went well and plans for improvement.	
Reflective critique	

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EP Template (UCSF): Curriculum Development, Instructional Design and Technology

ROLE: Curriculum Development, Instructional Design and Technology	
Name: Name (Click to enter text)	**Department:** Department
1. **Name your curriculum development, instructional design and/or technology activity(ies):**	
Name your activity(ies)	
2. **Your role(s):** Describe your role(s) and specifically what you contribute.	
Role(s)	
3. **Learners and amount of contact:** Describe types, levels and numbers of learners.	
Learners and amount of contact	
4. **Builds on best practice/evidence:** Describe your preparation including needs assessment the use of best practice and evidence where available, your professional development, and/or congruence with national, curriculum, and/or program goals.	
Builds on best practice/evidence	
5. **Goals and learning objectives:** List goals and <u>learning objectives</u> of program. If these are extensive, provide just a few illustrative examples.	
Goals and learning objectives of program	
6. **Methods:** Describe the curriculum, instructional resources and/or technology used, innovations employed, how these align with objectives, and rationale for choices.	
Methods	
7. **Results and impact:** Describe evidence of learner ratings of teaching/course, learning outcomes, application of knowledge in other settings at UCSF, impact on educational programs, and/or recognition/honors within the institution for this work.	
Results and impact	
8. **Dissemination:** Describe how your efforts have been recognized by others externally through peer review, dissemination, use by others, or teaching awards nationally.	
Dissemination	
9. **Reflective critique:** Describe your reflections, what went well and plans for improvement.	
Reflective critique	

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EP Template (UCSF): **Educational Leadership**

ROLE: Educational Leadership	
Name: Name (Click to enter text)	**Department:** Department
1. Name your educational leadership role(s):	
Name educational leadership role(s)	
2. Your role(s): Describe your role(s) and specifically what you contribute.	
Describe your role(s)	
3. Groups served and amount of contact: Describe types, levels and numbers of stakeholders (faculty, students, residents); amount of contact you have with them.	
Stakeholders and amount of contact	
4. Builds on best practice/evidence: Describe your preparation, including the use of best practice and evidence where available, and your professional development.	
Builds on best practice/evidence	
5. Vision and goals: Describe vision, goals and/or congruence with national, institutional, curriculum, and/or program goals. If these are extensive, provide just a few illustrative examples.	
Vision and goals	
6. Methods: Describe the methods used to achieve goals, and how these align with institutional priorities and resources, and innovative solutions.	
Methods	
7. Results and impact: Describe evidence of stakeholder satisfaction, learning or other outcomes, impact on educational programs, and recognition//honors for leadership at UCSF.	
Results and impact	
8. Dissemination: Describe how your activities have been recognized by others externally through peer review, dissemination, use by others, or leadership awards nationally.	
Dissemination	
9. Reflective critique: Describe your reflections, what went well and plans for improvement.	
Reflective critique	

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EP Template (UCSF): Learner Assessment

ROLE: Learner Assessment	
Name: Name (Click to enter text)	**Department:** Department
1. Name your learner assessment activity(ies):	
Learner assessment activity(ies)	
2. Your role(s): Describe your role(s) and specifically what you contribute to learner assessment.	
Your role(s)	
3. Learners and amount of contact: Describe types, levels and numbers of learners.	
Learners and amount of contact	
4. Builds on best practice/evidence: Describe your preparation including the use of best practice and evidence where available, your professional development, and/or congruence with national, curriculum, and/or program goals and resource utilization.	
Builds on best evidence/practice	
5. Goals for assessment: List goals for assessment. If these are extensive, provide just a few illustrative examples.	
Goals for assessment	
6. Methods: Describe assessment formats and methods, how these align with objectives, and rationale for choices.	
Methods	
7. Results and impact: Describe evidence of learner satisfaction, learning outcomes, application of assessment process to other settings at UCSF, impact on educational programs, and/or recognition/honors within the institution.	
Results and impact	
8. Dissemination: Describe how your efforts have been recognized by others externally through peer review, dissemination, use by others, or awards nationally.	
Dissemination	
9. Reflective critique: Describe your reflections, what went well and plans for improvement.	
Reflective critique	

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EP Template (UCSF): **Executive Summary**

Executive Summary of Most Significant Contributions to Teaching and Education	
Name: Name (click to enter text)	**Department**: Department
Overall faculty roles: In one sentence, list your faculty roles (teaching, research, patient care, administration) and approximate time allocation to each.	
Overall faculty roles	
Changes in role(s) over time: In one sentence, describe any major changes in teaching roles over the past 2 or 3 years.	
Changes in role(s)	
Important contributions to education: Identify educator role in parentheses and list contribution in a phrase. Describe what was done, how well it was done and its impact in 2-3 sentences. Use only as many as are appropriate to your teaching (1-5). Note that (a) Teaching and at least one additional Detailed Role Description are required for Academy membership applications, and (b) you must select from the contributions below in preparing your Detailed Role Descriptions (over the past 2 or 3 years).	
First important contribution to education: Teaching	
(Teaching), contribution, description.	
Second important contribution to education	
(Educator Role), contribution, description.	
Third important contribution to education	
(Educator Role), contribution, description.	
Fourth important contribution to education	
(Educator Role), contribution, description.	
Fifth important contribution to education	
(Educator Role), contribution, description.	

https://meded.ucsf.edu/faculty-educators/educators-portfolio

Educator Portfolio Examples

- Educator Overview
  - Example 1
  - Example 2
  - Example 3
  - Example 4
- Direct Teaching
  - Example 5
  - Example 6
  - Example 7
- Direct Mentoring
  - Example 8
  - Example 9
- Curriculum Development, Instructional Design, and Technology
  - Example 10
- Educational Leadership
  - Example 11
  - Example 12
- Learner Assessment
  - Example 13

https://academicaffairs.ucsf.edu/advance/EducatorPortfolio.php

Educator Portfolio

- What is the Educator Portfolio?
  - An app that provides storage of teaching and teaching effectiveness documentation for appointment, promotion and tenure decisions.
  - Each faculty member's portfolio will be different, depending on their work and its context.

- Why is the Educator Portfolio important?
  - Increased accessibility
  - Multimedia documentation storage
  - Nonlinear Thinking
  - Standardization of evaluation process
  - Provides concise formatting that is preferred by the appointments and promotions committee

https://www.vumc.org/faculty/about-educator-portfolio
https://medicine.mc.vanderbilt.edu/files/public_files/Documents/Nielson_Society/Educator-Portfolio_Overview_2-14-18.pdf

The Educator's Portfolio : Guidelines for Construction of an Educator's Portfolio

Guidelines for Construction of an Educator's Portfolio

The purpose of this guide is to help faculty at the University of Miami Miller School of Medicine assess and document their educational activities for the purpose of appointment, promotion, and tenure.

Background

The idea of the teaching portfolio began with the publication of A Mini-Guide to Preparing A Teaching Portfolio, published in the spring of 1978 in Ontario (Shore et. al, 1978). Since then, the concept of a teaching or educator portfolio, alternately called a teaching dossier, has become an international movement fired by the growing need to measure educational activities so that they can be rewarded. Traditionally, it has taken faculty on the clinician educator or educator tracks longer to get promoted compared to their peers on the research track, as they did not have effective ways to document their educational efforts and promotion's committees were unfamiliar with criteria for educational scholarship.

The Educator's Portfolio

Sample Portfolios

Guidelines for Construction of an Educator's Portfolio

Guidelines for Promotion

UMMSM CV Template

http://edo.med.miami.edu/the-educators-portfolio/subsect-portfolio-guidelines
http://edo.med.miami.edu/the-educators-portfolio/subsect-sample-portfolios

The EP Has Many Uses

- Documentation: creating or updating your CV
- Goal-setting: with mentor/advisor, annual performance review
- Recognition: teaching award, teaching academy
- Competition: for intra/extramural grant funding
- Career progression: negotiating a raise, seeking promotion or a new job

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Developmental vs Promotional EP

Developmental
- Formative
- Comprehensive
- Long, unlimited
- Updated annually

Promotional
- Summative
- Narrow
- Short (5-8p), limited
- Created for promotion or advancement

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Promotional EP = Key Achievements

KEY ACHIEVEMENTS (locally defined)

DEVELOPMENTAL EP = EVERYTHING
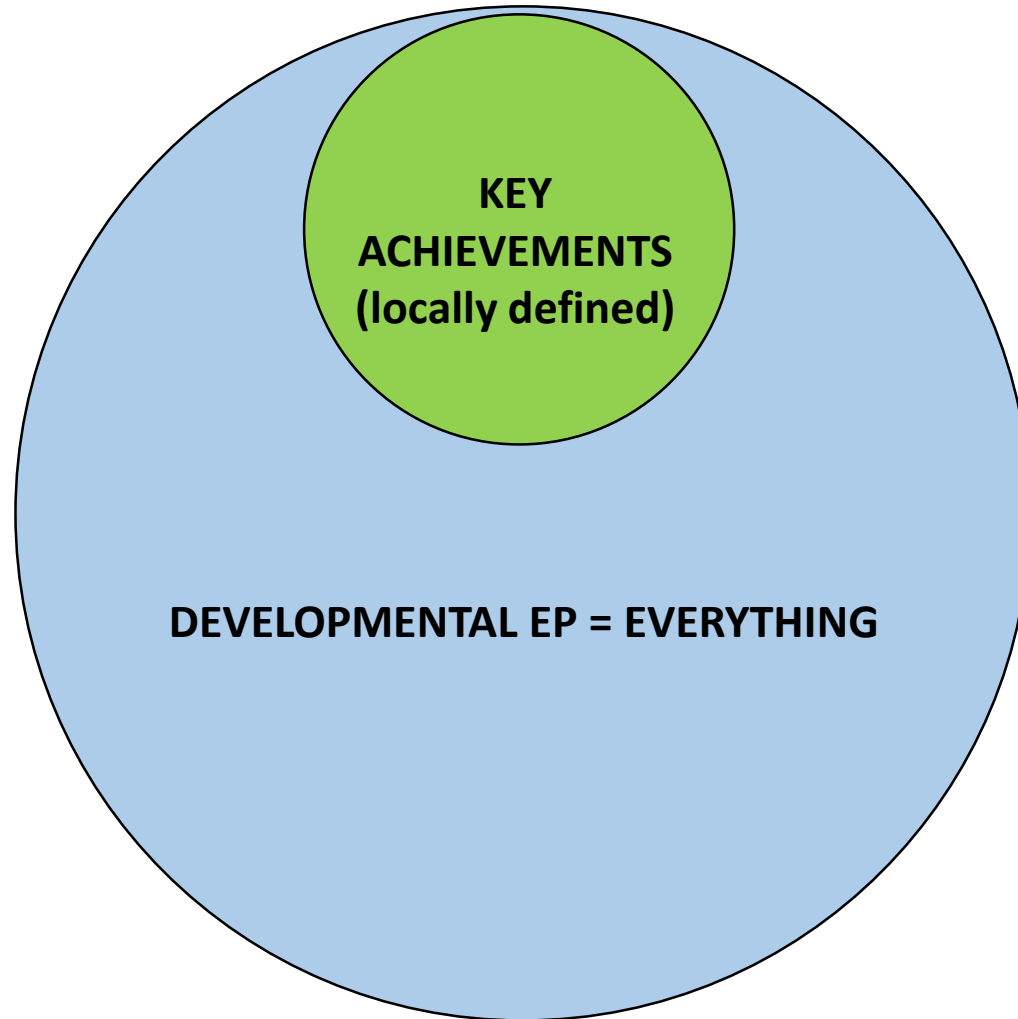
Educational Scholarship & Research

Highlight how your work has been:

- **Peer-reviewed** by a community of educational scholars (print or web publications, meeting presentations, etc.)

- **Disseminated** as evidence of making a genuine contribution to the educational community

- **Used by others** for whom your work is a platform from which to build additional knowledge

In addition to listing your publications and providing data on citations of your articles, look for evidence that others have been influenced by or adapted your work

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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

EP Take Home Points

1. Treat your EP as an essential partner to your CV.

2. Populate and update your EP regularly with achievements in teaching, learner assessment, curriculum development, mentoring/advising, educational leadership/administration.

3. Use and document the Glassick criteria for all work in which you aspire to achieve excellence as an educator.

4. <u>Review your EP with a mentor</u> at least annually to set goals and identify current or emerging areas of excellence.

5. Meet with academic promotion experts in your department / dean's office to identify what "key achievements" will matter most and highlight those in your EP.

6. Don't restrict your EP to just the key achievements – they may differ across institutions and you never know . . .

Additional Resources

AAMC MedEdPORTAL Publications:

Using the AAMC Toolbox for Evaluating Educators: You be the Judge!

Original Publication | Published: January 18, 2013

The Educator's Portfolio & Curriculum Vitae - Workshop & Resource Guide

Original Publication | Published: October 4, 2007

Journal Publications:

Little-Wienert K, Mazziotti M. Twelve tips for creating an academic teaching portfolio. Med Teach. 2018 Jan;40(1):26-30.

Dalton et al. Twelve tips on how to compile a medical educator's portfolio. Med Teach. 2018 Feb;40(2):140-145.

Driessen E. Do portfolios have a future? Adv Health Sci Educ Theory Pract. 2017 Mar;22(1):221-228.