



EDUCATOR PORTFOLIO TEMPLATE 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 not intended to be submitted as a "high stakes" EP for a promotion review.** The precise format, length, and content of a promotional EP differ from institution to institution. Typically, a promotional 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 **individual** 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.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 promotional 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 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.

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 and have evolved over time.

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).

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

- I. TEACHING
- II. ASSESSMENT OF LEARNERS
- III. CURRICULUM DEVELOPMENT
- IV. MENTORING AND ADVISING
- V. EDUCATIONAL LEADERSHIP AND ADMINISTRATION
- 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. 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 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	Where taught (local, reg, nat, 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 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).

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).

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:

For questions, contact Constance Baldwin, email: constance_baldwin@urmc.rochester.edu

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?

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

I. Overview of Section I

These questions refer to your teaching activities.

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.
4. Use the space below to share any reflections on teaching activities that are not covered above.

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

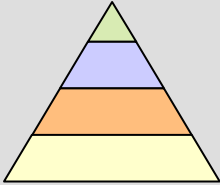
Assessment Method	Teaching activity number	Context of assessment	Your role Development of new tool, implementation of existing tool, analysis/synthesis of results	Number and types of learners assessed per year	In what category of Miller's Triangle does this assessment fall?*	How did the results of your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

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.
4. Use the space below to share any reflections on teaching activities that are not covered above.

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

GNOME* Elements	Evidence of Quality
Goals/objectives	
Learner needs assessment	
Teaching/learning methods	
Learner evaluation and feedback	
Curriculum/program evaluation	

* **GNOME:** G = Goals, N = Needs, O = Objectives, M = Methods, E = Evaluation. [Roberts, K B. Educational principles of community-based education. Pediatrics. 1996; 98(6 Pt 2):1259-1263.]

Please add additional narrative details or comments if you wish:

Overview of Section III

1. How did the information obtained through your curricular development activities change your educational practice?

Template developed by the Academic Pediatric Association for the Educational Scholars Program

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.
4. Use the space below to share any reflections on your curricular development activities that are not covered above.

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	Their role/position when you were their mentor/advisor	Mentoring Topic	Their current position	Mentee achievements*

* E.g., papers and grants and well as promotions, leadership positions, and educational awards. 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

Overview of Section IV.

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.

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

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.

Leadership/Administration Grid

Title of program/course(s) that you have directed	Level of program/course or committee Departmental/Institutional /Regional/National/International	Duration of role in years
1.		
2.		
3.		
Name of educational committee(s) that you have led		
4.		
5.		
6.		
Name of educational committee(s) on which you have been a member		
7.		
8.		
9.		

Choose **ONE program** as an example of your best effort and provide the following:

Narrative description of the program and its impact :

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

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.

4. Use the space below to share any reflections on leadership and administration activities that are not covered above.

NOTE ON SECTIONS VI AND VII

Sections VI and VII on scholarly approach to education and products of educational scholarship are *vitaly* 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

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 that have made a significant impact on your philosophy or practice as an educator.**

Professional Development in Education Grid

Name of Program	Sponsoring organization/ institution	Type of program Education Degree, Educational Professional Development Program, Educational Conference of > one day, Educational Workshop	Dates	Description of Activity or 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

Template developed by the Academic Pediatric Association for the Educational Scholars Program

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