# Tips for Planning and Writing Your Educator Portfolio[1]

**Introduction**

An educator portfolio (EP) presents to others the strengths of your teaching and educational innovations. It complements your curriculum vitae as an information source that focuses on your career as an educator. **An EP documents the quantity, quality and impact of your educational contributions.** Thus it permits judgment about the institutional value of your work and its importance to the broader field of education. Putting this document together is important for promotion if your career is focused on education. It has the added advantage of encouraging you to reflect upon your educational skills and accomplishments, and the direction in which you want to move your career.

**Essential Elements of Educator Portfolios[2]**

Essential elements of the EP are:
- Educational philosophy statement (see Appendix 1)
- Educational contributions in **one or more** of five domains:
    1. Teaching
    2. Assessment of Learners (see Appendix 2)
    3. Curriculum Development (see Appendix 3)
    4. Mentoring and Advising
    5. Educational Leadership and Administration (see Appendix 3, 4)
- Evidence of scholarship is integrated into the domain presentations (see Appendix 5)

You do not need to cover all **five domains** in your EP, only include those that are focal to your educational efforts. You may well add new domains to your EP as your career matures.

**Suggestions across all domains:**

1) In the template, each domain includes a grid to provide evidence of **quantity**, narrative comments that address **quality**, and references to scholarship to show **impact**.
2) **Quantity** is easiest to document, IF you have kept good records of your work. Since space is limited, you may want to group quantitative data by category and/or date.
3) **Quality** is often best demonstrated by your use of a ***scholarly approach***, which means use of evidence-based methods or models, systematic planning, effective presentation, and reflective practice. Glassick's six criteria[3] provide an excellent framework for describing quality of educational work (see Appendix 2).
4) **Impact** is usually documented by products that meet criteria for scholarship (peer-reviewed talks, workshop, posters, articles, see Appendix 5). Evidence that your models or tools have been adopted or adapted for use by other programs offers added value.
5) **Narrative components** are intended to provide data not easily conveyed by numbers in a grid. Each domain asks for comments that address the quality and impact of your activities, often through a demonstration of a scholarly approach. These narrative comments personalize your information and show the depth of your thinking about your work as an educator.
6) To show quality and impact in a small space, **select from your activities** those that show you in the best light and present these in more detail. It is better to provide a deeper description of few activities than to list many things at a superficial level.
7) The **evidence of scholarship** in each domain of your EP will supplement the bibliographic information in your CV. Add annotations that clarify how publications or presentations were innovative, were well accepted, or had an important impact.

**Educational Philosophy Statement**

A strong educational philosophy statement describes your application of a structured and thoughtful approach to education, grounded in practical teaching experience and your understanding of educational theory. It is helpful to be familiar with the literature on medical education and effective teaching strategies used by educators in other fields.

That said, **this is YOUR philosophy, not someone else's**! Although the philosophy statement is traditionally the first section of the educator portfolio, we suggest writing this section last, so the principles discussed reflect the rest of the portfolio. Many first time EP writers find the composition of the philosophy statement challenging. See Appendix 1 for some questions to prime your thinking.

**Domain 1: Teaching**

The heart of most educator portfolios is the presentation of teaching activities. This is an opportunity to demonstrate the quality of your teaching with much more detail than a curriculum vitae allows. The teaching activities grid will show the **scope and quantity** of your teaching: time spent in each teaching activity and how often it is repeated, number and types of learners involved, and how the activity fits into a curriculum or training program. We recommend that you indicate both your preparation and contact time in estimates of hours, and distinguish between them (e.g., Contact hours = 1, Preparation hours = 4). Later in your career, to save space you will need to group similar activities together by type of learner, type of teaching, date, or some combination of these or other categories. Narrative comments allow you to demonstrate **quality** in your educational work by discussing your teaching sources, models, and methods, as well as innovations. Peer-reviewed scholarship is the best evidence for **impact**: include not only papers, posters and meeting presentations, but also workshops. Annotate items that are particularly innovative, well accepted, and/or have had an important impact.

**Evaluation** and **reflective practice** are particularly important to teachers. Assemble and summarize data to demonstrate your teaching effectiveness, e.g., teaching evaluations by learners, feedback from peer observers, or workshop reviews. In narrative comments, discuss how you have used these data to inform your future teaching.

**Domain 2: Learner Assessment**

When reading this domain of an EP, reviewers are likely to ask if you have used the right type of tool to assess the category of learning objectives that your teaching targets (knowledge, skills/behaviors, attitudes). For example, a multiple choice test will not effectively measure improvement in a skill, while a clinical performance test may not measure learning of concepts and theory. Use the hierarchy of Miller's Triangle[4] to describe the quality of your assessments (See Appendix 3). You should try to assess learning at the highest levels of the triangle that align with your educational objectives, assuming that resources are not limiting. Scholarly assessments document evidence of validity and reliability.[5] Do not include in this domain your use of standardized evaluation forms provided by the program for which you teach.

**Domain 3: Curriculum Development**

Teaching and curriculum development often overlap: major teaching responsibilities (such as a seminar series) often include curriculum development as well. Clarify the connections with cross-references. As a rule of thumb, consider for inclusion in this domain any teaching event you develop that lasts for over 3-5 hours (cumulatively). As your career progresses, you will probably want to focus only on the most important of these activities.

The grid allows you to demonstrate the **scope** and **quantity** of your curriculum development activities. You might want to organize these into categories, perhaps by subject matter or by learner type. The GNOME analysis[6,7] is provided so you can choose one of your most significant curriculum development accomplishments and give more detail about its scholarly **quality**. Collectively, the GNOME categories reflect use of a scholarly approach. Peer-reviewed scholarship is an important indicator of **impact** in this domain, especially if it shows that other institutions have adopted or adapted your curriculum.

### Domain 4: Mentoring and Advising

The grid provides a structure for listing all of your mentees or advisees. Somewhere you need to maintain a complete list, but for a promotional EP, you may choose to list only mentees and advisees whose achievements are the most noteworthy, or who exemplify the focus of your career. Reviewers are particularly impressed by mentoring that leads to joint publications or other forms of scholarship. This domain may overlap with Domain 5, if you advise many learners in a program that you direct. Clarify the connections with cross-references.

### Domain 5: Educational Leadership and Administration

A number of kinds of activity can be included in this domain. Most important is your leadership of programs, program components (e.g. a rotation, conference series), or committees. For these, include information in the grid and in narrative comments that show how the program has excelled and how it has influenced the institution or organization that sponsored it. You may want to focus primarily on one or two programs that illustrate your best efforts.

To demonstrate a **scholarly approach**, you can use Glassick's Criteria[3] (see Appendix 2) to show how the program was systematically planned and implemented**.** Program evaluation data provide evidence of **quality**; evaluation methods are often organized around Kirkpatrick's hierarchical model[6] (see Appendix 4). Evidence of **quality** can include not only process or outcome data, but scholarly products, accreditation results, or grant support. **Impact** is demonstrated by scholarly products and adoption of the program model in other settings.
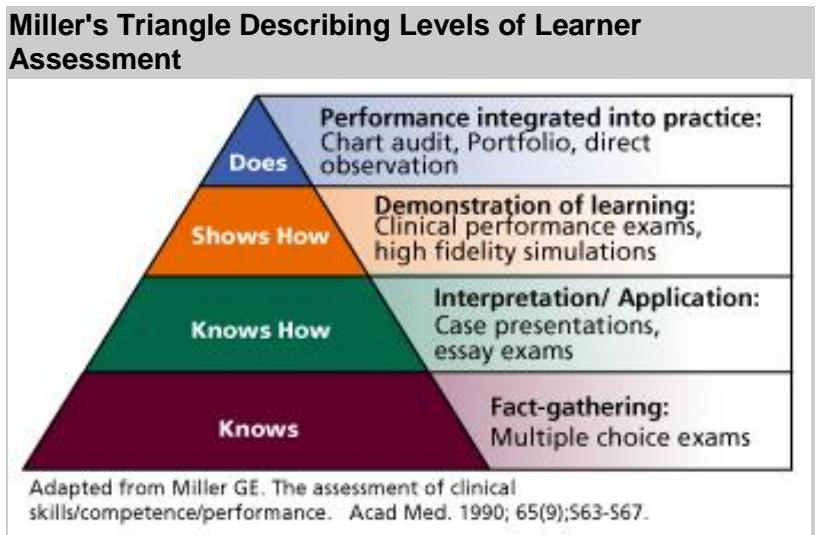
# APPENDICES

**Appendix 1.  Planning an Educational Philosophy Statement**

| Reflection Questions for an Educational Philosophy Statement |
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| 1.  Looking broadly at the way I like to teach, what is my approach to education? |
| 2.  Thinking about why I teach as I do, what principles appear to underlie my teaching? |
| 3.  What are the characteristics of a good teacher and a good learner? |
| 4.  What are the roles and responsibilities of students and teachers? |
| 5.  What are my thoughts about how people learn? |
| 6.  What environmental factors promote or impede learning? |
| 7.  What personal or interpersonal factors promote or impede learning? |
| 8.  How do I decide on the goals of instruction? How are these goals affected by the needs and expectations of learners, the teaching setting, community needs, etc. |
| 9.  What factors influence my choice of teaching and evaluation strategies? |
| 10. What are my special strengths as a teacher? What makes me most proud in my practice as an educator? |
| 11. How can I illustrate my educational philosophy or principles with examples from my own teaching experience? |

## Appendix 2: Learner Assessment

Miller's Triangle[4] provides a useful, widely accepted hierarchy for learner assessment. You should try to assess learning at the highest levels of the triangle that align with your educational objectives. However, high level assessments (such as direct observation in the practice setting) can be time intensive. It is usually wise to align the intensity of your assessments with the importance of the learning activity and the resources available.
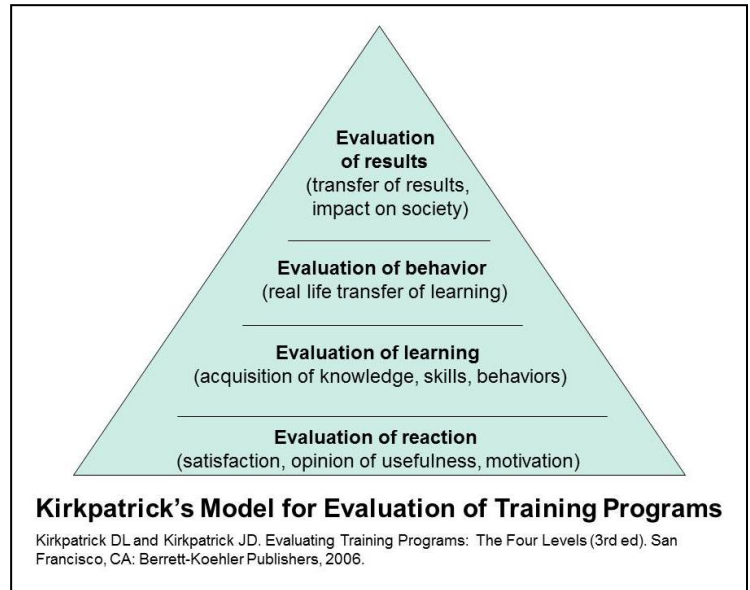
**Miller's Triangle Describing Levels of Learner Assessment**



Adapted from Miller GE. The assessment of clinical skills/competence/performance. Acad Med. 1990; 65(9);S63-S67.

## Appendix 3.  Glassick's Criteria for Excellence in Educational Scholarship

Glassick's criteria[3] are an adaptation to the educational setting of standards often used to evaluate clinical research, and are widely known and respected among educators. This flexible model can be applied in many different ways to describe a scholarly approach to education.

| Glassick's Criteria for Excellence in Educational Scholarship | |
|---|---|
| **Criteria and Definitions** | **Examples for Potential Inclusion in an EP** |
| 1.  **Clear Goals:** stated purpose, realistic objectives, important questions | Planning of teaching module around curricular goals and needs of specific target group<br>Hypothesis-based educational research |
| 2.  **Adequate preparation:** understanding of literature, appropriate skills, needed resources | Education guided by prior assessment of learners<br>Use of best practices in curriculum development<br>Faculty development preceding new teaching activity |
| 3.  **Appropriate methods:** choice of methods that match goals, effective use and flexible application of methods | Use of teaching/learning methods that suit a variety of learning styles<br>Selection of teaching methods that maximize the educational potential of a clinical setting<br>Use of performance-based learner assessments |
| 4.  **Significant results:** goals are achieved, results are important, field is advanced | Strong learner outcomes from valid and reliable evaluations<br>Published papers<br>Adoption of models by other institutions |
| 5.  **Effective presentation:** presentation well organized, forums appropriate, message clear and sound | Successful workshops and platform presentations<br>Peer-reviewed publications and approved grants<br>Successful garnering of institutional support for new programs |
| 6.  **Reflective critique:** work critically evaluated, supported with good evidence, evaluation used to improve future studies | Thoughtful response to one's teaching assessments<br>Review of evaluation data from new curriculum to plan refinement<br>Systematic review of learner assessments to guide program improvement |

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## Appendix 4.  Program Evaluation

Kirkpatrick's hierarchical model[8] (see figure) is widely used to show the quality of a program evaluation. All levels are important, but those as the higher levels demonstrate greater impact on learners and beyond. At the lowest level, one evaluates learner reaction. At the second step, one measures participants' learning in the abstract. At the third level, one measures whether the learners applied their learning in the real world. At the highest level, which is often difficult to achieve in the educational setting, a program is evaluated by whether participants' learning had an impact on patients or society.

**Evaluation of results**
(transfer of results, impact on society)

**Evaluation of behavior**
(real life transfer of learning)

**Evaluation of learning**
(acquisition of knowledge, skills, behaviors)

**Evaluation of reaction**
(satisfaction, opinion of usefulness, motivation)

**Kirkpatrick's Model for Evaluation of Training Programs**
Kirkpatrick DL and Kirkpatrick JD. Evaluating Training Programs: The Four Levels (3rd ed). San Francisco, CA: Berrett-Koehler Publishers, 2006.

## Appendix 5.  Three P's Criteria for Educational Scholarship

Scholars have reached consensus on the following definition of educational scholarship, called the Three P's Criteria.[2] The end product of a research or evaluation project must pass **peer review** by a community of educational scholars, and **be published or presented** to make it a genuine contribution to the community of educators. For highest credit, scholarly products should also be **used by others as a platform** for their work. These criteria resemble those commonly used to evaluate scientific research.

## References

1. This document is adapted from: Baldwin CD, Gusic ME, and Chandran L. The Educator Portfolio: A Tool for Career Development. Faculty Vitae, Winter 2008. Available at: https://www.aamc.org/members/gfa/faculty_vitae/148574/educator_portfolio.html

2. Simpson D, Fincher RM, Hafler JP, Irby DM, Richards BF, Rosenfeld GC, and Viggiano TR. Advancing Educators and Education: Defining the Components and Evidence of Educational Scholarship. Proceedings from the American Association of Medical Colleges Group on Educational Affairs Consensus Conference on Educational Scholarship, 9-10 February 2006, Charlotte, NC. Washington DC: AAMC 2007. *Many of the principles discussed in this document were developed at this consensus conference.*

3. 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.

4. Miller GE. The Assessment of Clinical Skills/Competence/Performance. Acad Med.1990;65(9);S63-S67.

5. Cook and Beckman, Current Concepts in Validity and Reliability for Psychometric Instruments: Theory and Application.  Am J of Med (2006) 119, 166.e7-116.e16

6. Roberts, KB, DeWitt, TG, Goldberg, RL, and Scheiner, AP. A program to develop residents as teachers. Arch Pediatr Adolesc Med. 1994;148:405–10. *A simplified and practical version of the model developed by Kern et al (Ref 6).*

7. Kern DE, Thomas PA, and Hughes MT. Curriculum development for medical education: A six-step approach (2nd Ed.). Baltimore, MD: Johns Hopkins University Press, 2009. *The classic book on curriculum development.*

8. Kirkpatrick DL. Evaluating Training Programs: The Four Levels (3rd ed). (2nd ed). San Francisco, CA: Berrett-Koehler Publishers, 2006.

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