**EDUCATOR PORTFOLIO ANALYSIS TOOL**

**For Use With APA Developmental Educator Portfolio Template**



**Faculty Evaluated:**

**Evaluator:**

**Date:**

**Note to Evaluator:** This tool has been peer reviewed and approved by MedEdPORTAL, 2008. The tool is designed for use with the **APA Developmental Educator Portfolio Template** [<http://www.ambpeds.org/Site/education/education_faculty_dev_template.htm>, approved by MedEdPORTAL, 2007], but it is adaptable for use with EPs in other formats. An accompanying instruction sheet offers an itemized explanation for each of the sections below.

**Each item in this analysis tool is either qualitative or quantitative:**

* For quantitative items (e.g. item 6-8), put scores in the third column.
* For qualitative items (e.g. items 1-3), put scores in the fourth column, using the scale shown at the top of that column. Add comments to explain each qualitative score.

**Missing data:** If data for a whole section are missing from an EP, check box to indicate this at the beginning of that section. If data for individual items are missing, enter NA (not available) in the scoring cell.

**INTRODUCTORY SECTION OF THE EP**

| **Evaluation Item** | **Specifiers for Rating or Score**  **Note: For qualitative ratings, Level 2 = INTERMEDIATE is described** | **Quantitative**  **Score** | **Qualitative Ratings and Comments**  1=Novice  2=Intermediate  3=Expert |
| --- | --- | --- | --- |
| **EDUCATIONAL PHILOSOPHY** | | | **Check if no entries in this section ❑** |
| 1. **Self-reflection, self-appraisal** | Learns from one’s educational experiences about oneself as a teacher and about learning in general. Articulates lessons learned |  | **Rating:**  **Comments:** |
| 1. **Philosophy both rooted in theory or principle, and applied to experience** | Uses a principled approach, based on educational theory or models, illustrated by specific examples from experience |  | **Rating:**  **Comments:** |
| 1. **Evidence of philosophy applied throughout EP** | One’s instructional and evaluation strategies are consistent with one’s stated educational philosophy |  | **Rating:**  **Comments:** |
| **FIVE-YEAR GOALS** | | | **Check if no entries in this section ❑** |
| 1. **Goals set bar appropriately high** | Stated goals reflect commitment to personal growth as an educator |  | **Rating:**  **Comments:** |
| 1. **Focused and realistic plan** | Goals are specific and feasible, and clearly linked to an appropriate learning plan |  | **Rating:**  **Comments:** |

**FIVE DOMAINS OF EDUCATIONAL ACTIVITY**

| **Evaluation Item** | **Specifiers for Rating or Score**  **Note: For qualitative ratings, Level 2 = INTERMEDIATE is described** | **Quantitative**  **Score** | **Qualitative Ratings and Comments**  1=Novice  2=Intermediate  3=Expert |
| --- | --- | --- | --- |
| **I. TEACHING** | | | **Check if no entries in this section ❑** |
| 1. **Total Learner Number/yr** | Documented directly in the EP  [See instructions if other formats are used] | **Total Learner Number/yr =** |  |
| 1. **Total Teaching Hours/yr** | Documented directly in the EP  [See instructions if other formats are used] | **Total Teaching**  **Hours/yr=** |  |
| 1. **Total Teaching Impact Score** | Each activity gets a geographic impact score:  Department= 1  Institutional= 3  Regional= 5  National=10 International= 10 | **Total Teaching Impact**  **Score=** |  |
| Total Teaching Impact Score is the sum of geographic impact scores for all teaching activities |
| 1. **Variety of teaching strategies** | Teaching incorporates at least 3 strategies that go beyond passive transfer of knowledge (e.g., , interactive lectures, small group sessions, workshops, clinical precepting) |  | **Rating:**  **Comments:** |
| 1. **Teaching evaluation score** | Comparison with local peers, if available:  Below average = 0  Average = 1  Above average= 3  Superior= 5 | **Teaching evaluation score =** |  |
| 1. **Multiple sources and types of evaluations** | Uses 2 or more types of evaluation of teaching from 2 or more different sources (e.g., learners, peers, etc.) |  | **Rating:**  **Comments:** |
| 1. **Teaching Awards Score** | Each award gets a geographic level score:  Department= 1  Institutional= 3  Regional= 5  National=10  International= 10 | **Teaching Awards Score=** |  |
|  | Teaching awards score is the sum of geographic level scores for all awards |  |  |
|  |  |  |  |
| **II. ASSESSMENT OF LEARNERS** | | | **Check if no entries in this section ❑** |
| 1. **Total Learner Assessment Score** | Implementation= 1  Analysis/Synthesis= 2  Development=3  If EP author plays more than one role in a particular assessment, sum the scores for each role. | **Total Learner Assessment Score =** |  |
| Total score = Sum of all role subscores |
| 1. **Learner assessment strategies** | Uses multiple learner assessment strategies suitable to teaching context and desired learner outcomes |  | **Rating:**  **Comments:** |
| 1. **Balance of methods that include upper level “Miller’s Triangle” strategies** | Uses highest level feasible in one or more teaching contexts |  | **Rating:**  **Comments:** |
|  |  |  |  |
| **III. CURRICULUM DEVELOPMENT**  **Indicate curriculum rated in Items 18-21 \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_** | | | **Check if no entries in this section ❑** |
| 1. **Curriculum Impact Index** | # of learners taught:  < 50= 1  50-150= 2  > 150= 3 | **Curriculum Impact Index=** |  |
| Implementation score:  Curriculum not yet implemented=1  Curriculum implemented = 2 |
| Geographic Impact Score:  Department= 1  Institutional= 3  Regional= 5  National= 10  International= 10 |
| Individual Curriculum Index=  Implementation score x learner # score x geographic impact score |
| Total Curriculum Impact Index=sum of Individual Curriculum Indices |
| 1. **Curriculum Role Score** | Each curriculum is scored for degree of responsibility in development  Leader= # x 5  Contributor = # x 1 | **Curriculum Role Score=** |  |
| Curriculum Role score is the sum of individual subscores |
| 1. **Quality of Goals/Objectives** | Goals are appropriate in scope; objectives are specific and measurable/evaluable |  | **Rating:**  **Comments:** |
| 1. **Quality of Needs Assessment** | Curricular design uses learner needs assessment to choose and refine goals/objectives and methods; use learner assessment data to refine needs assessment |  | **Rating:**  **Comments:** |
| 1. **Quality of Methods** | Curriculum design includes variety of methods that address educational goals, and meet needs of diverse learners in specific educational settings |  | **Rating:**  **Comments:** |
| 1. **Quality of Evaluation** | Curricular design includes sound learner assessment methods (valid, reliable, feasible); curriculum modified periodically using results of learner and program evaluations |  | **Rating:**  **Comments:** |
| **IV. MENTORING AND ADVISING** | | | **Check if no entries in this section ❑** |
| 1. **Mentee Number** | Number of mentees/advisees | **Mentee Number =** |  |
| 1. **Mentee Productivity Score** | Score reflects mentees’ grants and publications.  Use 1-5 scale:  1= poor  2= marginal  3= satisfactory  4=good  5= excellent | **Mentee Productivity Score=** |  |
| 1. **Mentee Professional Advancement Score** | Score reflects mentees’ promotions, leadership roles, and/or teaching awards. Use 1-5 scale:  1= poor  2= marginal  3= satisfactory  4=good  5= excellent | **Mentee Professional Advancement Score=** |  |
| 1. **Quality of Mentoring** | Mentoring philosophy reflects careful thought about experience; mentees describe significant impact of mentor on career |  | **Rating:**  **Comments:** |
| **V. EDUCATIONAL LEADERSHIP & ADMINISTRATION** | | | **Check if no entries in this section ❑** |
| 1. **Program Leadership Index** | For each leadership activity in courses or programs, multiply its geographic impact score and its duration score to create a leadership sub score | **Program Leadership Index =** |  |
| **Geographic impact:**  Department= 1  Institution= 2  Regional= 3  National= 4  International= 5 |
| **Duration of Leadership**:  1-2 years= 1  3-5 years= 2  6-10 yrs= 3  >10 yrs= 4 |
| Program Leadership Index is a sum of leadership subscores for all leadership activities in this category |
| 1. **Committee Leadership Index** | For each committee leadership activity, multiply its geographic impact score and its duration score to create a committee leadership subscore | **Committee Leadership Index =** |  |
| **Geographic impact:**  Department= 1  Institution= 2  Regional= 3  National= 4  International= 5 |
| **Duration of Leadership**:  1-2 years= 1  3-5 years= 2  6-10 yrs= 3  >10 yrs= 4 |
| Committee Leadership Index is a sum of all the committee leadership subscores |
| **28. Total Committee Membership Score** | Duration of membership:  1-2 years=# x1  3-5 years=# x2  6-10 yrs=# x3  >10 yrs=# x4 | **Total Committee Membership Score =** |  |
| Committee membership score is a sum of all the subscores |
| **29. Quality of Leadership** | Strong stakeholder testimonials or accreditation results |  | **Rating:**  **Comments:** |
| **30. Reviewing and Moderating Index** | Reviewing at national level only:  Of grants: # x 10  Of papers: # x 5  Of Abstracts (present or workshops): # x 2 | **Reviewing and**  **Moderating Index =** |  |
| Moderating sessions at national meetings:# x 2 |
| Total index= sum of subtotal scores for reviewing and moderating |

**SCHOLARLY ACTIVITIES**

| **Evaluation Item** | **Specifiers for Rating or Score**  **Note: For qualitative ratings, Level 2 = INTERMEDIATE is described** | **Quantitative**  **Score** | **Qualitative Ratings and Comments**  1=Novice  2=Intermediate  3=Expert |
| --- | --- | --- | --- |
| **VI. SCHOLARLY APPROACH TO EDUCATION**  **Note to the Evaluator:** To complete this section, review all parts of the Educator Portfolio, especially Educational Philosophy, Goals, and narrative comments. Place ratings (using the scale below) and comments in the third column. | | |  |
| 1. **Total Educational Professional Development Score** | Scores for types of educational professional development activities**:**  Degree-granting program = 20  Professional development = 10  Conferences (>1day)=# x 5  Workshops  (<1day) =# x 1 | **Total Educational Professional Development Score =** |  |
| Total Educational Professional DevelopmentScore = sum of totals above |
| 1. **Evidence of reflective educational practice** | Adapts one’s teaching in response to teaching and program evaluations, and outcomes of learner assessments |  | **Rating:**  **Comments:** |
| **NOTE:** **For Items 33 and 34, give special consideration to a educator’s area(s) of focal educational effort, such as innovative projects or special curricula or tools.**  List focal area(s) of scholarly effort evaluated for these items: | | | |
| 1. **Application of an accepted model or structured approach** | Uses Miller, Kirkpatrick, Musick, or equivalent model of own design |  | **Rating:**  **Comments:** |
| 1. **Adherence of Glassick’s criteria of excellence** |  |  | **Composite rating of all 6 criteria:**  **Comments:** |
| * **Clear goals** | Stated purpose, realistic objectives, important questions |  |
| * **Adequate preparation** | Understanding of lit, appropriate skills, needed resources |  |
| * **Appropriate methods** | Choice of methods that match goals, effective use and flexible application of methods |  |
| * **Significant results** | Goals achieved, results important, field advanced |  |
| * **Effective communications** | Presentation well organized, forums appropriate, message clear and sound |  |
| * **Reflective critique** | Work critically evaluated, supported with good evidence, evaluation used to improve future studies |  |
| **VII. PRODUCTS OF EDUCATIONAL SCHOLARSHIP**  The **Products of Educational Scholarship** items are all quantitative and yield two summary index scores. Data may come from any EP domain. | | |  |
| 1. **Scholarly Productivity Index**   Index = sum of 5 subtotals for items below | **Calculate each subtotal and add the five subtotals to derive this index** | **Scholarly Productivity Index =** |  |
| * Peer reviewed publication (print or electronic) | Journal impact factor score:  Low <1= 1  Medium 1-2 = 3  High >2= 10 | For each publication listed, multiply impact factor score by author score. Sum all of these to get Subtotal 1  **SUBTOTAL 1=** |  |
| Author score: First/second or last author=3  Other=1 |
| * Peer reviewed/Invited presentations and workshops | Presentation mode score:  Poster=1  Didactic presentation or workshop=2 | For each presentation listed, multiple mode score by geographic impact score. Sum all of these to get Subtotal 2  **SUBTOTAL 2=** |  |
| Geographic Impact Score:  Department=1  Institutional= 3  Regional= 5  National/International= 10 |
| * Non-peer-reviewed publication | Author score:  First/second or last author publication= 1  Other=0 | Subtotal 3 is the number of non-peer-reviewed publications with author score of 1  **SUBTOTAL 3=** |  |
| * Book Chapter or Book | Book score:  Chapter author=1  Book editor =3  Book author= 5 | For each book related activity, multiply the number by the book score. Sum all of these to get Subtotal 4  **SUBTOTAL 4=** |  |
| * Educational Product | Geographic Impact Score :  Department=1  Institutional= 3  Regional= 5  National/International= 10 | For each educational product, multiply the number by the geographic impact score. Sum all of these to get Subtotal 5  **SUBTOTAL 5=** |  |
| 1. **Educational Grants Index** | Score only grants for which author is the PI or Co-PI :  For each grant multiply the geographic impact score by the dollar score. Sum all of these to get the Educational Grants Index. | **Educational Grants Index =** |  |
| Geographic Impact Score:  Department=1  Institutional= 3  Regional= 5  National/International= 10 |
| Direct costs:  >$500,000= 10  $100,000-500,000=5  $10-100,000=3  $1-10,000=1 |