# Guide to Applying for Membership

# in the

# The Academy for the Advancement of Educational Scholarship

# at the

# Louisiana State University Health Sciences Center – New Orleans

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**and the**

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The contents of this document and the templates for the Educator Portfolio
are also available at the Academy website:
http://www.medschool.lsuhsc.edu/medical_education/Academy/omerad-academy.asp

# LSUHSC-New Orleans
# Academy for the Advancement of Educational Scholarship Membership

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# LSUHSC-New Orleans Academy for the Advancement of Educational Scholarship

## Applying for Membership
### February 2011

Dear Colleague:

Thank you for your interest in becoming a member of the Academy. The Academy is a voluntary member organization that supports an inter-professional community of educators committed to advancing education and educators. Membership is by application, determined through a peer review process and renewable every five years. Members are expected to participate actively in the Academy to sustain active membership status. The Academy provides faculty development opportunities for all LSUHSC faculty members (e.g., workshops, mentoring, collaborative projects), with specific benefits for Academy members, and serves as a health sciences center-wide venue for recognizing and facilitating collaboration, excellence and scholarship in teaching and education. Academy members pursue their own and support others' involvement in professional development as educators, and contribute their expertise and leadership to sustain and enhance the Academy, its programs, and activities. As an inter-professional community, Academy members strive to bring value to health professions education through collaboration, innovation, and scholarship.

In addition to *Fellow*, *Master Teacher*, and *Teaching Scholar*, two new membership categories, *Associate* and *Protégé*, have been implemented to promote inclusivity in the Academy and expand opportunities for professional development, recognition, and advancement as educators across the academic career continuum. The new *Associate* membership category is available to all LSUHSC faculty members at any stage in their careers, from Day 1. The new *Protégé* membership category provides opportunities for residents, clinical fellows, post-doctoral, and doctoral students to engage in the Academy with sponsorship and mentoring support of Academy members. The required components of membership applications vary by category. Other sections of this guide provide details. Below is a quick overview of each membership category requirements.

| Member Category | Eligibility/Criteria | Educator Portfolio – Required Components | | | | |
|---|---|---|---|---|---|---|
| | | Cover Page | Structured Personal Statement | Curriculum Vitae | Letter of Support | Education Domain Sections |
| Protégé | • Resident, Fellow, Post-doc, Doctoral student in good standing<br>• At least one Academy member as sponsor/mentor<br>• Specific focus and/or goals for educator development | ✓ | ✓ | ✓ | 1 | |
| Associate | • LSUHSC-NO faculty<br>• Actively engaged in $\geq 1$ educational domains | ✓ | ✓ | ✓ | 1 | |
| Fellow | • LSUHSC-NO faculty $\geq 2$ years<br>• Engagement and evidence of excellence $\geq 1$ domains | ✓ | ✓ | ✓ | 1 | $\geq 1$ |
| Master Teacher | • LSUHSC-NO faculty $\geq 2$ years<br>• Engagement, excellence, and scholarly approach $\geq 2$ domains<br>• $\geq 1$ scholarly publication/dissemination in education | ✓ | ✓ | ✓ | 1 | $\geq 2$ |
| Teaching Scholar | • LSUHSC-NO faculty $\geq 2$ years<br>• Excellence and scholarly approach $\geq 3$ domains<br>• Record of scholarly publication/dissemination<br>• Regional, national, and/or international recognition for scholarship in teaching and education | ✓ | ✓ | ✓ | 1 | $\geq 3$ |

Membership applications may be submitted to the Office of Medical Education Research and Development (OMERAD) at any time. Applications are peer-reviewed on a quarterly basis beginning the 15th of *March, June, September, and December.* Once accepted into the Academy, members may begin participation immediately. All new members are formally introduced at an annual recognition ceremony during the *Academy Fall Symposium* and *Educational Scholarship Day* that is held each October. For more information or to request consultation, please contact the OMERAD (504-568-2140 or omerad@lsuhsc.edu). On behalf of the Academy Executive Council and all of the Academy members, we welcome your application!

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Professor and Director
The Academy and the OMERAD

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Kirk Nelson, PhD, MPT, Assistant Professor, Co-Chair
Academy Executive Council

# Section 1:  General Information about Academy Membership

Section 1 includes information relevant to all Academy membership categories that include the following:  member expectations and benefits, eligibility, and an overview of the application, peer review process, and timeline.  Beginning on the next page, additional details about each membership category are provided to help you select the one that fits your situation best.  In Section 4, a separate instruction sheet and checklist are available for each membership category to help you complete the membership application.

## Expectations of Members

The vitality of the Academy is in its membership.  Regardless of the membership category you select, submitting an application for membership indicates that you agree to meet the following expectations to sustain active membership in the Academy.  Please be sure read these carefully.

- Participate in the annual Fall and Spring Academy Symposia (1 day each)
- Participate in the annual Educational Scholarship Day (held in conjunction with the Fall Symposium)
- Maintain active involvement and achievements in teaching excellence and educational scholarship that are consistent with one's category of membership
- Participate in relevant faculty development, mentoring, and collaboration opportunities
- Contribute to the leadership and governance of the Academy (e.g., provide feedback to Academy leaders, participate in business meetings and other planning events, participate in or lead an Academy Team, lead or participate in projects that fit professional development interests and goals)
- Share and disseminate ideas, innovations, methods, and permanent products of teaching within and outside of the Academy
- Serve as an advocate, role model, advisor, and mentor in teaching and education within and outside of the Academy, and encourage colleagues to engage in the Academy and Academy-sponsored activities
- Submit a new application portfolio by the fourth year anniversary of each membership cycle to apply for a new 5-year term of membership

## Benefits of Academy Membership

Through the Academy, members can benefit from a variety of programs, services, resources that include, but are not limited to, the following:

- Academy Symposia – Two theme-based conferences per academic year (Fall and Spring), featuring plenary presentations, workshops and nationally/internationally recognized educators in the health professions, and Academy members-only activities (e.g., business meetings, member symposia).  The Fall Symposium also includes an annual Educational Scholarship Day and Recognition Program.

- Educational Enhancement Grants (EEG) program – Project proposals are peer-reviewed to award funds to support 12-month projects in four categories:  Educational Enhancements, Faculty Study Teams, Faculty Mentoring, and Faculty Development Supplemental Travel Awards.  All members may participate in funded projects, but Principal Investigators/Project Directors and recipients of Travel Awards must be Fellows, Master Teachers, or Teaching Scholars in good standing.

- AAMC Medical Education Research Certificate (MERC) program – Members have the opportunity to complete workshops at LSUHSC-New Orleans toward achievement of the certificate with costs covered by the Academy.

- Mentoring Opportunities – Be a mentor or find mentors to enhance knowledge and abilities in targeted domains of teaching and education.

- <u>Faculty Development and Leadership</u> – Participate in and lead within the Academy organization (e.g., Academy Team, Advisory Groups, Executive Council, special projects), present faculty development sessions, collaborate with others through special programs and educational research projects.

- <u>Member Profiles</u> - Individual, narrative profiles of Academy members provide one way to share areas of teaching/education interests and expertise, connect with collaborators, and benefit from opportunities to share expertise and scholarly work in teaching and education with others.

- <u>Academy Bulletin</u> – Published Fall and Spring, this magazine provides opportunities for Academy members disseminate results of scholarly work in teaching and education through short articles and to learn about other resources and opportunities.

- <u>Docere Fellowship in Health Professions Education</u> – Fellows, Master Teachers, and Teaching Scholars may apply to enroll in a 24-month inter-professional program that includes coursework, independent study, professional consultation and mentorship, completion of an educational scholarship project and continued development of one's Educator Portfolio. Enrollment in this program is limited to 10-12 faculty members and no tuition or other costs are charged to participants.

- <u>Collaborative Projects</u> – The Academy fosters a community of educators in which members can network and seize opportunities to collaborate with colleagues who share common interests in teaching, education, and the ongoing development of excellence and educational scholarship.

# Eligibility for Membership

The first step in applying for membership is to choose a membership category for which you are eligible and that best fits your involvement, achievements, and professional development goals in teaching and education. Below are brief descriptions of each membership category to help you make a decision.

*Protégé:* The Protégé membership category is open to all residents, fellows, post-doctoral, and doctoral students who are affiliated and in good standing with a LSUHSC educational degree/professional training program and for whom at least one Academy member has agreed to serve as the applicant's sponsor/mentor upon acceptance into the Academy. The application includes goal or purpose-directed intentions for engaging in teaching and education and participating in the Academy.

*Associate:* Faculty members with active LSUHSC faculty appointments who are actively involved in teaching and education may apply for the Associate membership category at <u>any point following their initial date of hire</u>. This category of membership facilitates broad, inclusive engagement of faculty members in the Academy as an inter-professional community of educators. Associate members have goal or purpose-directed intentions for participating in the Academy, appropriate to their career stage and current involvement in teaching and education. Examples include the following:

- New faculty members may want to focus on faculty development activities to develop core knowledge and skills in teaching and education and/or seek mentorship for engaging in educational scholarship. In addition, early engagement of new faculty members in the Academy facilitates their professional development and preparation for seeking Academy membership as a Fellow when they reach their second anniversary of hire.

- Faculty members at various stages of their careers (e.g., junior, mid-career, senior) may seek membership in the Academy to demonstrate support for the Academy mission, mentor junior members in teaching, and/or explore or learn about educational scholarship. Some may want to experience the Academy before making a decision about applying for a different member category. Still other faculty members may be engaged in teaching and education, but their primary responsibilities and/or scholarly area are outside of teaching and education and may find the Associate member category their best option.

*Fellow, Master Teacher, and Teaching Scholar*: Faculty members with active LSUHSC faculty appointments who have <u>reached their two-year anniversary of initial hire</u> and who are actively involved in teaching and education may apply for any of these membership categories. Applications include an Educator Portfolio with relevant sections for the required minimum number of

education domains (i.e., at least one for Fellow, two for Master Teacher, and three for Teaching Scholar). Educational domains include the following: 1) Direct Teaching, 2) Curriculum Development, Instructional Design, and Assessment of Learning, 3) Advising and Mentoring, 4) Educational Leadership and Service, and 5) Educational Research. Sufficient evidence of *Quantity*, *Quality*, and *Engagement* must be presented in the Educator Portfolio, using the appropriate templates and category-specific criteria.

# Quantity, Quality, and Engagement Criteria

If you not sure about which membership category is best for you at this time, then go to Section 2 for general descriptions.

# Education Domains

If you are not clear about any of the education domains, then please go to Section 3 for explanations and how Quantity, Quality, and Engagement criteria are addressed with each domain.

# Instructions and Materials for Preparing Your Application

Once you have selected a membership category, you can download from the Academy website the Educator Portfolio templates that you need (Microsoft Word files), specific instructions and a checklist for assembling and submitting your application:
 http://www.medschool.lsuhsc.edu/medical_education/Academy/omerad-academy.asp.

# Peer Review Process

All aspects of the peer review process are strictly confidential. Upon receipt in the OMERAD, your application is screened for the required components and letters of support are added upon receipt. Once complete, your application is assigned for review in the appropriate Academy Advisory Group (AAG). All applications are reviewed by at least two AAG members and Teaching Scholar applications undergo additional external review by at least one teaching and education scholar at another health professions education institution. Individual reviews are presented for discussion by AAG members and a recommendation is forwarded to the Academy Executive Council for a final decision. The Academy Director oversees all aspects of peer review and serves as a non-voting resource person for the AAGs and AEC. Each applicant is notified of the AEC decision and receives the confidential, written feedback from individual and group reviews. Applicants may discuss results further with the Academy Director.

# Timeline for Application Process

| Activity | Date(s) |
|---|---|
| *Call for Applications* | Open throughout the year |
| *Information Sessions*<br>• Individual consultation<br>• Group sessions, workshops | • Check the Academy website for listings<br>• To schedule workshops, special sessions and consultation, contact the OMERAD at 504-568-2140 or omerad@lsuhsc.edu |
| *Application Review Cycles* | Quarterly: Commences the 15th of March, June, September, December |
| *Peer Review of Applications* | Completed within 4-6 weeks of each quarterly deadline |
| *Notification of New Members* | Immediately following completion of quarterly peer reviews |
| *Induction of New Members* | Annual, conclusion of Educational Scholarship Day (typically held during the 2nd week of October) |

If you have questions or need assistance at any time, please call or email the OMERAD (504-568-2140, omerad@lsuhsc.edu).

# Section 2:  General Explanations of Quantity, Quality, and Engagement Criteria

This section includes a general description of how *Quantity*, *Quality*, and *Engagement* are conceptualized within the Academy, represented nationally in the professional community, applied overall to the Academy membership categories.  For applications as Fellow, Master Teacher, and Teaching Scholar, additional and specific application of these criteria are included within the Section for each of these membership categories.  Being familiar with each of these will help to ensure that you have selected the most appropriate category for membership in the Academy.

Considering the eligible education domains in which you have been involved, please use the following descriptions of the expectations for Quantity, Quality, and Engagement to select the membership category for which you have "solid" evidence.  Once accepted into the Academy, you may remain as long as you like in the selected category or you may apply at any time for a different category of membership as you expand and enhance your involvement and achievements (e.g., from Associate to Fellow, Fellow to Master Teacher).

## Quantity, Quality, and Engagement

*Quantity:*    Descriptions of the type, frequency, and duration of your teaching and education roles and activities at LSUHSC, (i.e., what, how much, and over what time period). Describing clearly the amount of time and effort you devote to specific teaching and education activities provides important evidence of your professional involvement.

*Quality:*    Evidence (e.g., ratings, evaluation results, peer review, examples) that demonstrate effectiveness and excellence in a particular domain on which you are basing your application, including process and outcomes, qualitative and quantitative.  Include comparative results when possible.  In some instances, letters of support can provide a form of peer review and provide important evidence of quality.

*Engagement:*  Evidence demonstrating the nature of your engagement with the education community.  For the purposes of the Academy, evidence can reflect one or both of two types of engagement – *Scholarly Approach* and *Educational Scholarship*.

- A *Scholarly Approach* is demonstrated when you reflect upon and draw from your prior work and the work of others in the education community (e.g., professional literature, best practices, invited peer review/critique), and use of the results to systematically design, implement, assess, refine, expand, and/or redesign a teaching method, an educational activity or material, an assessment tool, or a program or curriculum.

- *Educational Scholarship* is demonstrated when you both draw from <u>and</u> contribute to the education community through dissemination of your scholarly work in forms that others can use and build upon (e.g., workshops, discussions, invited and peer reviewed presentations and publications of enduring educational materials, articles, chapters, and books).  You should include clear evidence that demonstrates how you have made your teaching/education work *public*, presented it in a *platform* that others can use and build upon, and solicited *peer review* and critique.  Finally, the breadth of engagement with the educational community may be achieved at the local, regional, national, and/or international levels.

# Quality and Engagement:  The Glassick Criteria

With regard to both *Quality* and *Engagement*, six standards of scholarship have been widely adopted by the academic community (Glassick, Huber, and Maeroff, 1997).  Generally referred to as the *Glassick criteria*, these standards are relevant for each of the Academy membership categories and education domains.  For example, applicants for the Protégé category and new faculty applicants for the Associate category may target only one or two of the Glassick criteria.  Experienced faculty applicants for the Associate and all applicants for the Fellow member category may target several, but not all, of the Glassick criteria.  Master Teacher and Teaching Scholar application should reflect evidence for all six criteria.  Further, portfolio applications for Master Teacher should include some evidence of these standards for the element of Engagement (more so for scholarly approach than scholarship).  Teaching Scholar application portfolios should include consistent evidence of fully realizing each of Glassick criteria within *Engagement*, particularly for scholarship.  With particular application to teaching and education, the six Glassick criteria are summarized briefly as follows:

- Clear goals – purpose of teaching and learning is defined clearly; goals are clear, realistic, and achievable; important questions are identified about teaching and learning

- Adequate preparation – understanding of existing scholarship in the education field (general and discipline-specific); adequate skills and resources are demonstrated relative to the specific teaching and learning endeavor;  content/skills are accurate, complete, and structured at an appropriate level of difficulty for targeted learners

- Appropriate methods – educational methods fit goals and are used effectively;  methods are modified as necessary to accommodate situational changes

- Significant results – goals are achieved;  the scholar's work contributes substantially to others (e.g., learners and colleagues) and to the educational community;  the scholar's work is open to further exploration (e.g., self, by others, collaboratively with others)

- Effective presentation – appropriate style and methods are used to communicate teaching conceptions and practices to others;  communication about teaching, learning, assessment, and other aspects of professions education are clear and accurate;  scholarly work is presented using a platform that facilitates others' use and ability to adapt or build upon the work

- Reflective critique – scholar engages in self-reflection and critique and uses insights to enhance and/or expand on one's prior work or that of others (e.g., teaching, understanding of learning processes, assessment and evaluation, advising, curriculum and program development);  evidence of one's work is shared publicly and critique is welcomed;  critique and evaluation results are used to improve the quality of future work

The following *P's* further clarify the specific standards for achieving scholarship, and in this case, scholarship in teaching and education:  *Pertinent* (the work matters, is important), *Public* (shared with others), *Peer reviewed* (invites and uses critique), *Permanent* (enduring, tangible products), and *Platform* (presented in a way that facilitates others' use or ability to build upon the educator's original work).  Of these, public, peer reviewed, and platform are essential.  Applicants for the Master Teacher and the Teaching Scholar member categories will want to pay particular attention to these *P's* in providing evidence of scholarship in response to the Engagement criteria.

# Section 3: Definitions, Descriptions, and Presenting Evidence within each Education Domain

## Introduction

This section pertains predominantly to applications for the categories of Fellow, Master Teacher, and Teaching Scholar. However, individuals applying for membership as Protégé and Associate can also benefit from reading this section, as explanations will likely enhance your thinking and reflection about what might be included and emphasized in the Structured Personal Statement that you write and what might be emphasized in a letter of support. In all instances, please think broadly about what you have achieved and can provide as evidence in your Educator Portfolio. Discussing your work and potential evidence with others (e.g., colleague, an Academy member, or consultation from the OMERAD) and soliciting their feedback can help you present your best evidence. For example, many faculty members learn that they have more evidence that can be included in the portfolio than first thought. While not exhaustive, this section describes each of the education domains, defines key concepts, and provides guidance for addressing the Quantity, Quality, and Engagement criteria within each of these domains. As you read about each, you might find it helpful to make a list of activities, products, and evidence of achievements. Reading and making notes can help you decide which education domains to include in your portfolio and confirm that you have selected the most appropriate membership category for your application to the Academy. Once you have done this, you might also find it helpful to create a folder for each education domain in which you can insert materials and examples to have handy when you begin the complete the necessary Educator Portfolio templates. This process can also facilitate establishing a routine approach to managing documentation and maintaining an up-to-date portfolio and curriculum vitae.

# General Instructions

For each education domain, the templates provide space and prompts for helping you provide narrative/description and specific evidence of Quantity, Quality, and Engagement. Additional, supplemental templates are provided for some education domains to further assist you in presenting complete and clear descriptions and evidence of your engagement and accomplishments in teaching and education. Below is some general guidance for completing these elements for the education domains that you have selected. Later in this section, beginning on the next page, more specific guidance is provided for each of the education domains, including suggestions for particular membership categories.

*Narrative/Description:*

The information you include will be important for assuring that the reviewer has a sufficient background to interpret the evidence you have for *Quantity*, *Quality*, and *Engagement*. Strive to be clear and concise, but include enough in your narrative/ description that reviewers will understand the nature, breadth, depth, and impact of your activities. Think about the narrative/description as your "story" that guides a reviewer through your evidence of achievements and scholarly contributions. Paying attention to the following features, the narrative/description can help assure that reviewers don't miss important elements, interpret evidence accurately, and appreciate fully the relevance of what has been presented:

- Regarding *Quantity*, it would be important to describe briefly the specific context(s), any unique features or challenges (e.g., related to content, learners, settings), scope of activities, and type(s) of effort relevant to the domain.

- Regarding *Quality*, the narrative/description might include relevant information describing how you defined effectiveness and excellence, what specific outcomes were targeted, and perhaps, any anticipated challenges or limitations in assessment choices. Providing sufficient description can facilitate reviewers' appreciation of the strength of evidence and any practical limitations.

- Regarding *Engagement*, the narrative/description should include specific information about how you have engaged in the community of educators. For example, you might describe briefly the predominant types of activities, venues you have used and why these fit your situation and focus of engagement best. How have you pursued a scholarly approach to teaching and education (e.g., focused reading, literature review, faculty development sessions, and consultation with experts)? How have you sought to contribute to the literature and the field (scholarship) and why did you choose the particular methods or activities for dissemination?

*Evidence:*

Information provided in these cells of the template can be descriptive statements, lists, summary results. For example, evidence of quantity might be statements of time and effort, reference to specific elements in a supplemental template (e.g., number of teaching entries in the Teaching Record or frequency and duration in the Advising and Mentoring Record). Quantity evidence might also include reference to specific entries in the curriculum vitae (CV). Regarding Quality evidence, this cell might include a list of outcomes, lists of summary results (e.g., summary quantitative performance ratings, statistical results, qualitative outcomes, peer-review conclusions, committee reviews and approvals, etc.); products, examples (e.g., curriculum excerpt, assessment instrument); or traditional forms of evidence that may be already in your curriculum vitae (e.g., publications, presentations, list of protégés/mentees, committee and leadership positions). While some evidence can be simply listed in the Evidence column, other evidence might be presented more effectively using a summary table, graph, excerpts of representative feedback comments from students or colleagues, or example materials that could be included in the Appendix. In such instances, be sure to list these Appendix items in the Evidence column and include the specific page numbers. For evidence of Engagement, brief descriptions and lists of scholarly activities and adopters/users of your original, creative educational products can be included. Much of the evidence of scholarship may already exist in your CV (e.g., publications, presentations, enduring educational materials). Do not duplicate information pertaining to such evidence in the portfolio; simply list and reference the CV entries in the Evidence column. In some instances, a letter of support could provide an important source of evidence. You should plan to discuss this with the relevant individual(s) you contact when soliciting these letters. As appropriate, list any relevant letters of support in the Evidence column.

# Education Domains - Specific Templates

For some education domains, additional, supplemental domain-specific templates are provided in addition to a page for Narrative/Description and Evidence. These are provided to help you effectively and efficiently organize and present essential information and evidence of your achievements in *Quantity*, *Quality*, and *Engagement*. For example, in the Teaching domain, please be sure to complete and include the Teaching Record template to summarize various aspects of your involvement in teaching over the past five years. Other specialized, domain-specific templates are included and should be used to present one or two illustrative examples that best reflect the breadth and depth of your achievements. Again, these templates include specific guidance and suggestions on the form as *italicized text* that should be replaced with your information (using a regular font, not italics). Additional explanation for these templates is included in the paragraphs below that pertain to each of the education domains.

## *Teaching*

This domain entails direct teaching of, but not limited to, undergraduate and/or graduate level learners in educational programs designed to culminate in a degree, certificate or other credential and peer or near-peer interactions focused on learning and developing knowledge, skills and attitudes (e.g., faculty development, continuing education programs). Teaching also occurs in a variety of learning environments, including face-to-face instruction of groups (e.g., in traditional large class/lecture settings, in small groups, at the bedside), with individual learners (e.g., graduate students in laboratory settings), and in other settings (e.g., clinical and professional field sites, and in community or outreach settings that are associated with particular disciplines/professions and educational programs). Direct teaching through distance learning technologies is also included in this domain.

*Quantity:* The Teaching Record form that is included in the Teaching domain template provides a format for presenting evidence of the *Quantity* of your teaching clearly and succinctly. The teaching record can also be cross-referenced as evidence of quality (e.g., representing different teaching methods for different types of students and content areas, long-term engagement in teaching certain learners, courses/clerkships, content). Clearly for Master Teacher and Teaching Scholar, it is important that the Teaching Record demonstrates more than one group of learners and more than one setting and teaching method. Such features should be highlighted as appropriate in the narrative/description and evidence sections of the template.

In the Narrative/Description section for Quantity of the Teaching domain template, describe the context(s) in which you teach, the proportion of your involvement within the overall scope of a course or educational program. You should communicate clearly the amount of time and frequency devoted to activities related to direct teaching. For example, how often and how much time do you devote to communicating with learners outside of the teaching setting (e.g., answer questions, provided additional assistance and explanation, providing additional learning materials, coordinating with other faculty in situations involving team-teaching or coordinated

teaching sessions). Sometimes evidence can be presented quantitatively, and in other instances, qualitative descriptions of extraordinary time and effort (e.g., description special activities or narrative example) are more effective. Teaching certain content that changes frequently requires more time for reading and researching the relevant literature to stay up-to-date and more frequent revision and redesign (e.g., learning objectives, teaching notes, and other forms of teaching preparation) than for other content areas that tend to be static. Such activities also contribute to the quantity of effort and should be described clearly in this section of your Educator Portfolio.

*Quality:* In the narrative/description section of the Teaching domain template, be sure to include any learner or context features that may be relevant for interpreting the significance of quality evidence. Features might include the level of preparedness of learners when you encounter them, whether you teach required or elective content, availability of resources, and other such factors that may influence the quality of processes and achievement of desired outcomes. Do not assume that reviewers will know about and appreciate the role such factors may play. Evidence of *Quality* may include, but not be limited to, learners' confidential evaluation of teaching through faculty or course effectiveness questionnaires, results of peer review of teaching using a standardized or systematic format and process, a list of teaching awards and honors accompanied by clear and concise descriptions of the associated criteria and selection process, and of course, evidence of student learning through internal and/or external methods (e.g., student performance on standardized measures, results and examples of learning portfolios or critical events). Educators who receive your learners might also be sources of evidence regarding the quality of their preparation for the subsequent learning and performance. Repeated invitations for teaching certain content or groups of learners can provide evidence of quality. Feedback provided in the form of letters, email messages, and narrative responses on teaching evaluation forms are other examples of evidence pertaining to quality. Results of educational evaluation and research might also apply. Specific letters of support that you solicit for inclusion in the Educator Portfolio can also provide a source of evidence for Quality.

*Engagement:* Evidence of Engagement with the education community might include how you have drawn from the literature and the field (e.g., searching the literature, pursuing focused reading, participating in faculty development and professional conferences, consulting with experts, identifying best practices or innovations led by colleagues or other institutions) and how you have applied what you've learned to enhance or innovate your teaching (*Scholarly Approach*). Examples of evidence pertaining to *Educational Scholarship* might include brief descriptions or a list of how you have presented your teaching approaches and methods (i.e., made public, presented using a platform that others can use and build upon), how you have invited peer review and critique (e.g., observations by colleagues, course directors, faculty development specialists), and who has been influenced and how (evidence might include letters or email messages from colleagues, a list of faculty or institutions using your approaches/methods, a list of presentations you have made to faculty about teaching methods). Of course, invited and peer-review presentations and publications related to your teaching approaches and methods that are listed in your curriculum vitae should be included and referenced as evidence.

## *Curriculum Development, Instructional Design and Assessment of Student Learning*

This education domain includes original, creative work pertaining to innovative developments and/or *substantial* re-design of curricula, instructional models, tools, and materials. Oftentimes, curriculum, instruction and assessment are intricately connected; thus, the reason to combine all three into a single education domain. However, you may be involved in only one or two of these elements. Enduring educational materials, curriculum plans and models, program models/descriptions, assessment instruments and procedures, workbooks and computer-based or web-based modules are among the examples fitting this domain. Each of these elements is further differentiated below:

- Curriculum Development refers to a longitudinal set of sessions or experiences that include some type of evaluation. In addition, a curriculum also includes elements such as eligibility or admission criteria, established standards for promotion, policies regulating sequence of courses, prerequisite requirements, and so on. Examples may include a traditional design reflecting a sequence of courses and experiences across a degree program and may also reflect the following examples: 1) sessions and independent activities within a course or clerkship, 2) a set of instructional modules consisting of sequenced and related sessions/activities within a course/clerkship, 3) threaded sessions/activities across courses or years pertaining to a particular theme, and 4) a set of faculty development or community-based experiences targeting particular goals/outcomes. Curricula may be developed to support learning in face-to-face, web- or computer-based, self-directed settings, or reflect a combination of delivery formats.

- Instructional Design refers to the development of original or substantially re-designed teaching/learning models, activities, and/or materials that are used within a single session or experience or as a short series of activities (e.g., a series of 2-3 sessions over several days or weeks). For example, one might present a unique design for using a systematic set of steps in simulation-based teaching/learning sessions (e.g., immersive scenario experience, followed by a specific approach for debriefing discussion and reflection, followed by a deliberate practice exercise). While the content changes from session to session, the overall instructional method is the same.

- Assessment of Learning may reflect informal (formative) methods and tools for providing feedback, as well as formal methods (summative) that are used for making judgments or decisions based on established performance levels (e.g., minimum performance criteria or grades). Assessments can focus on an individual or a group, methods may be quantitative and/or qualitative, and formats can range from traditional knowledge tests, to performance checklists, to technologically-based assessments (e.g., simulation, virtual reality, computer-based or video-based assessments).

If you have been substantially engaged in many different projects fitting this education domain, you should not attempt to describe every one of them. Rather, use the Narrative/Description and Evidence page to provide a representative overview of your quantity, quality, and engagement within the most recent five years, then use the supplemental template provided for the education domain to present one example (no more than two) as your best evidence (i.e., most substantial, innovative, or successful efforts). If you choose to include a second example, be sure to use a separate supplemental template (i.e., one template for each example).

*Quantity:* It is important to include descriptions of the purpose, context, targeted audience, design, duration, and evaluation. Describe clearly your specific role and scope of responsibilities, particularly when activities pertaining to this domain have included collaboration with others. The template for this domain includes prompts and space for such features. Using the domain-specific template, be sure to describe the need, problem, or opportunity that promoted the project and describe the nature and participation of collaborators that may have occurred (e.g., individuals, types of groups internal and external), and the specific context in which the work was done.

*Quality:* Evidence may include summaries of learners' evaluations, peer-review (e.g., review and feedback from peers, review as part of curriculum committee, annual program review, or accreditation processes), achievement of intended process and product outcomes (e.g., learner achievement and performance on standardized, external examinations). To demonstrate positive impact or improvement, you might list as evidence of *Quality* the specific achievements of learning outcomes or the results of peer review or faculty adoption. Additional prompts are included in the template to help you consider different sources of evidence that you might have or could obtain. You might also consider some type of chart or graphical display that could be included as an appendix item that compares key features before and afternoon innovation or intervention was implemented. If so, please be sure to reference the page number(s) of the appendix entry in the Evidence column for Quality in the template for this domain. Use the supplemental template for this domain to present one illustrative example (no more than two). The six Glassick criteria used in the template provide a structure for presenting evidence of both *Quality* and *Engagement*. In completing this part of the template, it is important to describe briefly the specific process(es) that reflected the Glassick criterion in achieving the outcome or impact presented. For example, for *Clear Goals*, you should include the goal(s) and briefly describe or list steps used to identify the primary goal(s) of the work. Similarly, for Adequate Preparation, describe briefly how you drew from the literature and prior work (your own and others) to prepare for and achieve quality in the curriculum, instruction, or assessment of learning work. The description included for *Appropriate Methods* should demonstrate how the methods fit well with the goals and purpose of the project. For *Significant Results*, descriptions should include specific findings or outcomes and demonstrate how these related to the original goal and purpose for pursuing the work. Finally, for *Effective Presentation*, what venue and methods did you use to present this work to peers and how did you use the results of peer review and self-reflection (i.e., *Reflective Critique*) to improve and/or build upon the work for the future.

*Engagement:* Engagement with the educational community can be evidenced in ways similar to those mentioned for Teaching. Specific to this domain, evidence of how you have systematically studied curriculum examples and approaches at other institutions or in the literature and applied what you learned to what has been created or substantially re-designed reflects a *Scholarly Approach*. Seeking counsel from experts and collaborating with others to plan or coordinate teaching can also provide evidence of using a scholarly approach for engaging with others. Soliciting input, applying reflective critique and using this to refine elements of the project and processes, when done as a thoughtful and systematic process, can also provide evidence of engaging in a scholarly approach.

Similarly, evidence of pilot studies for specific curriculum and instructional elements and how results were used to finalize models and support successful implementation could be included. Working with colleagues and learners to optimize the fit of a new curricular, instructional, or assessment component within the existing educational program can also reflect scholarly engagement. Non-published scholarly outcomes (i.e., scholarship) might include a faculty manual, faculty/facilitator guide, syllabus, curriculum handbook, or program manual. Demonstrating how you have grounded assessment instruments or processes in previous work and publications and evidence of how you have systematically developed and validated use of the assessments are examples of scholarly approach. Even if assessment instruments and technical manuals have not been published in peer-reviewed venues, they still reflect non-published scholarly outcomes representing scholarship and should be listed when relevant. Invitations for consultation at other departments or schools regarding your work in curriculum, instructional design and assessment, publication of related educational materials (e.g., MedEdPORTAL), adoption by others, work of others who have build upon your prior work, and traditional forms of dissemination (e.g., peer-reviewed presentations, articles, chapters, and books) are all potential examples of *Scholarship*. Again, presentation of processes and outcomes fitting the Glassick criteria for selected examples and using the domain-specific template can present evidence of scholarly work and scholarship. Specific to scholarship are the template entries relating to *Effective Presentation*, *Reflective Critique*, and listing of dissemination activities and external grant/funding awards.

## *Advising and Mentoring*

Typically conducted on an individual basis, formal and informal advising and mentoring may also be conducted effectively in small groups and even at a distance. Such relationships may focus on academic, career, and/or personal goals and purposes. Among these types of activities are formal academic advising activities, informal mentorship, providing guidance or supervision for research and development projects beyond required curriculum and program responsibilities, career advising, and assistance with academic or personal difficulties or challenges. Advising and mentoring activities may reflect teacher-learner, senior-junior, and peer and near-peer relationships. Finally, advising and mentoring may reflect relationships among individuals within and beyond the LSUHSC academic community. Advising typically reflects a more limited or focused relationship that occurs over a limited period of time with the advisor serving predominantly as an information resource and guide. Mentoring reflects a sustained commitment that often represents more than one focus and from which both parties benefit. Such relationships may be initiated by mentors or protégés/mentees through formal and informal mechanisms, typically persist over an extended period through regular, purposeful interactions.

The Narrative/Description and Evidence template provides prompts for the types of information and evidence you might include. The *Advising and Mentoring Record* provides a template for presenting the breadth and depth of specific advising and mentoring relationships, such as is afforded in the Teaching domain using the Teaching Record. The information presented in this template typically provides considerably more details of the *Quantity* and *Quality* than the traditional listings included in the curriculum vitae. When completing Advising and Mentoring Record and presenting evidence in the Educator Portfolio for this education domain, care should be taken to avoid unnecessary duplication of information of CV entries, while ensuring the clear and complete presentation of achievements are afforded to the reviewers. Of note, there may be instances when identifying the Advisee/Protégé by name is not in the best interest of the individual (e.g., when the focus of the relationship was resolving an academic or personal challenge). In such cases, a descriptive phrase should be used (e.g., PGY-1, Y2 medical student, junior faculty in Anatomy). Also, in presenting descriptions and evidence of *Quantity*, *Quality*, and *Engagement*, do not duplicate information from your CV, but be sure to reference and cite specific entries to call these to the attention of reviewers.

*Quantity:* In addition to the narrative/description section of the template for Advising and Mentoring, the Advising and Mentoring Record provides structure and space for presenting evidence of *Quantity*. For example, the template provides space for listing learners and colleagues (by name or types of positions, as appropriate) who you have advised or mentored, associated purposes or goals, and estimates of time invested (e.g., duration, frequency, number of hours). To avoid redundancy, you might include a summary statement in the narrative/description and reference specific entries or elements (e.g., duration, frequency) in the Advising and Mentoring Record that best reflect your involvement. Some advising/mentoring relationships require more preparation and follow-up than others, so be sure to include sufficient information in the narrative/description to reflect time and effort beyond what is shown in the Advising and Mentoring Record.

*Quality:* Both pages of the Advising and Mentoring template provide structure and space for describing and presenting evidence of quality. For the evidence column, a bullet list of overall achievements with reference to specific entries on the Record might offer an effective presentation of quality evidence. For example, by including short descriptions of goals and outcomes achieved on the

Advising and Mentoring Record, these can be highlighted and interpreted as evidence of effectiveness and how specific efforts and processes led to intended (goal-oriented) and unintended outcomes/results. In addition, overall review of involvement with advisees and protégés within and across levels of the education continuum, how such relationships were initiated (e.g., by mentor or protégé), and continuity of experiences across individuals and time can also contribute evidence of quality. It is important for you to highlight specific elements in the Record in Narrative/Description and Evidence columns to assure that reviewers note the specific achievements you believe are most significant. Evidence of Quality can also be provided through one or more letters of support that you solicit for inclusion in your Educator Portfolio.

*Engagement*: The forms of evidence that parallel those mentioned in the previous domains are just some of the ways in which *Scholarly Approach* and *Educational Scholarship* should be considered. Additional prompts are included in the portfolio template to help you identify and include relevant description and evidence of achievements. In addition to familiar publication formats for research, evaluation, and educational materials reflecting this education domain, unpublished scholarly outcomes could include examples such as a mentor or protégé guide or manual, a program design for pairing mentors and protégés and monitoring effective processes, a workshop, training series, or set of print or multi-media materials to facilitate effective mentoring processes. Some of these could also be published scholarship (e.g., publication in MedEdPORTAL or other publication of education and faculty development materials).

## *Leadership and Service*

Typical of this domain are both formal, titled educational administrative and leadership positions (e.g., course/clerkship directors, program/office/center directors, department chairs, curriculum coordinators, curriculum chairs) and volunteer, elected, or appointed positions that can reflect educational planning, governance, monitoring or evaluation responsibilities within the LSUHSC and/or an individual's school or department (e.g. committee member). Educational leadership and service contributions and achievements might also occur as a result of informal, untitled roles and activities. Similar roles and responsibilities occurring within professional organizations that relate directly to teaching and education are also included.

- Outstanding administration and management reflects elements of order, organization, efficiency, accountability, reliability and responsible behavior. Administering and managing also include effective performance to assure safe and positive climate, open and responsive communication, and adequate resources for others to fulfill work responsibilities. *While effective administration and management are necessary, they are not sufficient to demonstrate leadership.*

- Outstanding leadership reflects how an individual has had positive influence on others and the organization, how results have been achieved through engagement of others, and typically entails qualities such as vision, strategic sense, communication, organization, team-building, monitoring and feedback, acquiring and providing necessary resources, organizational and human resource development, creativity, and innovation. Leadership qualities may also reflect how an individual has developed individuals or a group, unit, or an organization to realize potential and/or achieve specific goals or outcomes.

- Outstanding service includes qualities such as dependability, timeliness, commitment, enthusiasm, extraordinary effort, and putting the needs of others and the organization ahead of one's personal interests and benefits.

*Quantity:* In the narrative/description section of the template for this domain, please be sure to include a brief, but complete and clear, description of the breadth and depth of involvement in leadership roles. Also, be sure to describe any particular features of the relevant contexts, problems, opportunities in which you have been involved in leadership and service, so reviewers/readers can fully appreciate the contributions and achievements of your specific leadership role(s) and responsibilities. For evidence, reference by page and item those leadership roles and activities that are already included in your curriculum vitae and list or bullet any others in this section of your portfolio. Consider including examples or estimates, as may be necessary to clearly depict the extent to which you devote time and effort.

*Quality:* Keeping in mind the comments above for Quantity, be sure to include clear descriptions of the intended outcomes and supporting rationale for leadership behaviors and processes used to achieve desired results. It is important to describe any limitations or challenging features that might have depressed the potential for achieving results and how you may have addressed those as a leader, either from the beginning or as these emerged during the process. If assessment opportunities of quality were difficult or

limited, you should include a brief description of the situation in the explanation of the evaluation methods that were used to assess effectiveness, quality. Such information will be important to facilitating reviewers' assessments and interpretations within an appropriate and realistic context. Evidence presented for *Quality* can then be assessed within the relevant context regarding the actual achievements, list of outcomes or results, or evidence of impact (e.g., achieving goals and outcomes, maximizing resources, achieving successful change).

*Engagement:* Please think broadly about how you can provide evidence of the ways in which you have used prior work, professional literature, and the best practices demonstrated by others to enhance your efforts (i.e. *Scholarly Approach*) and they ways that you have made your work public and contributed to the larger community and professional field (i.e., *Scholarship*). You may have accomplished this through traditional forms of dissemination (e.g., peer-reviewed and invited presentations, journal and book publications), but you may also have evidence of other forms of contributing to the literature, adopted best practices, and the academic community. For example, consider and present evidence you may have (e.g., invitations to present or consult with others, appointed and elected positions to serve in professional organizations, on education policy boards, leadership councils). As a result of your leadership achievements and contributions, have you received invitations to conduct workshops, or do develop or lead fellowship or professional development programs to develop future educational leaders? What print or digital documents or materials have you created and shared with others? What feedback have you received (or could solicit) regarding these materials and how they have been used and built upon by others, and impacted others and other programs?

## *Educational Research*

This domain relates to the development of new knowledge in teaching, and education (e.g., developing and testing conceptual frameworks and theories, hypotheses-driven research); applied and educational evaluation research (e.g., training or intervention-based research, program evaluation). Scholarship resulting from research includes traditional forms of permanent products (e.g. papers, presentations, journal articles, chapters, monographs, books), more contemporary formats (e.g., other printed, computer- or web-based materials); the public dissemination of these products (including presentations and demonstrations); and evidence of the impact of such developments on relevant fields of health sciences education regionally, nationally or internationally. This domain also reflects the use of a variety of research approaches (e.g., descriptive studies, theory-based or applied research and development, evaluation studies, quantitative, qualitative and mixed-methods designs). Other educational research activities include development and validation of instruments and assessment procedures for intended purposes. Some educational research activities may be pursued with the expectation of generalizable outcomes that can be disseminated beyond the local setting (e.g., peer-reviewed publications) and others may be pursued for the specific, local intention of quality assurance and/or improvement. Activities may reflect inter-institutional collaboration and/or active involvement of regional and national professional organizations.

*Quantity, Quality, and Engagement:* Much of the information for this domain will likely be in your curriculum vitae already, particularly evidence that reflects traditional forms of research/discovery-based scholarship. In such instances, you should not duplicate information from your CV in the Educator Portfolio, but be sure to list and reference relevant CV entries in the portfolio template for this domain and where it can be found (e.g., page number, citation number), so reviewers are sure to consider this evidence related to teaching and education. Regarding Quantity and Quality criteria, consider any particular context features that might need to be described. For example, some educational research projects require considerably more time and/or resources that one might realize and the logistics necessary to assure successful completion may be complex and not obvious to others. In such cases, brief descriptions can contribute significantly to assuring that reviewers are aware and able to appreciate the time and effort that has been devoted to this work.

*Engagement:* Some educational research may be conducted for which publication and dissemination beyond the local academic community is not appropriate or intended (e.g., pilot study for a new educational module, educational evaluation research to examine the course or curriculum effectiveness, impact of an educational innovation, or the relationship between key features of a student population). You might also have an educational research study underway that is not yet complete, but far enough along to want to include it in your Educator Portfolio (especially since educational studies sometimes take a year or more to complete). Within the template for this domain, a supplemental template has been included for communicating clearly the essential details of such scholarly work. Keep in mind that you should <u>not</u> attempt to present every instance of unpublished or in-progress educational evaluation and research, but use the template to present <u>only one or two</u> of your most relevant or significant projects that best illustrate the scholarly approach, rigor, and excellence of your work in this domain.

# Additional Resources and Assistance

In addition to the information contained in this document, please refer to the AAMC Group on Education Affairs summary report and findings from its 2006 Consensus Conference on Educational Scholarship, *Advancing Educators and Education: Defining the Components and Evidence of Educational Scholarship* (July 2007), particularly pages 19-34.  The complete report is available online as a PDF from the following websites:

- LSUHSC-NO Academy:
  (http://www.medschool.lsuhsc.edu/medical_education/Academy/omerad-academy.asp).
- AAMC:
  https://services.aamc.org/publications/index.cfm?fuseaction=Product.displayForm&prd_id=196&cfid=1&cftoken=A06BFE28-A93C-8581-F7F069A610E544F7

At any time, please feel free to request an individual consultation to discuss your activities and potential evidence for developing your Academy membership application.  You may request assistance at any time by calling 504-568-2140 or emailing omerad@lsuhsc.edu.  You may also contact Academy members, particularly those who serve on the Academy Advisory Groups and the Executive Council.  Please consult the Academy website for lists of these members, additional resources, and announcements of upcoming workshops.

# Section 4:  Assembling Your Membership Application – All Categories

This section provides explanations and instructions for completing the required and optional templates of the Educator Portfolio, as well as guidance for appendix items and how to complete your Academy membership application.  Digital versions of the required and optional templates (Microsoft Word) and a checklist (PDF) for making sure you include all required items are provided on the Academy website.  Also included in this section is a separate instruction sheet for each membership category that explains specific application of criteria and any requirements that are unique to the category.  Before getting started here, please be sure to read the general guidelines in this section and the specific instruction sheet for your selected membership category, and then go to the Academy website to retrieve the required and optional templates you need.  Please call or email the OMERAD any time you have a question or would like guidance (504-568-2140, [omerad@lsuhsc.edu](mailto:omerad@lsuhsc.edu)).  Last, but not least, engage a trusted colleague or two to review your drafts and provide feedback, so you can ensure that your descriptions and forms of evidence are being interpreted as you intend.

## What to include in your Educator Portfolio

Your application Educator Portfolio is not all-inclusive of your teaching and educational activities and achievements, but limited to your *best evidence* for the category of membership and within each of the education domains you selected.  In addition, please limit information about your activities and accomplishments to the <u>most recent five years,</u> and in particular, emphasize those since being affiliated with LSU.  On occasion, applicants may find it necessary to describe or reference work or accomplishments from the more distant past in order to adequately provide a background or context for more recent or current work.  Of course, this can be done, but be concise and include only when it is essential to adequately presenting particular current work and accomplishments for peer review.

The Educator Portfolio should complement, not duplicate, your curriculum vitae.  The standardized templates have been designed to facilitate your inclusion and presentation of best evidence and to facilitate effective, systematic reviews by internal and external peer reviewers.  Each template includes suggestions and prompts for the types of information to include.  Additional guidance and suggestions have been provided for each education domain in Section 3.  The Educator Portfolio templates have been developed as a result of numerous reviews of Academy portfolios, input from internal and external portfolio reviewers, feedback from Academy members and others, reviews of the literature and input from colleagues at other institutions who are similarly engaged in Academy-type programs.

*NOTE for School of Medicine faculty:*  In the spring 2010, the Academy Educator Portfolio was adopted by the School of Medicine for use in academic advancement review and faculty evaluation. Only very minor adjustments were made on the Cover Page and the Structured Personal Statement to fit with the academic review process.  The templates for education domain-specific sections are the same for use in the Academy and the School of Medicine.  Therefore, you need only maintain and keep updated one portfolio.

## Required and Optional Forms

Digital versions of the required and optional templates in Microsoft Word are available at the Academy website ([http://www.medschool.lsuhsc.edu/medical_education/Academy/omerad-academy.asp](http://www.medschool.lsuhsc.edu/medical_education/Academy/omerad-academy.asp)).   If you need assistance with accessing and using any of these templates, please contact the OMERAD (504-568-2140, [omerad@lsuhsc.edu](mailto:omerad@lsuhsc.edu)).  A checklist (PDF) is also available on the website and on the next page for making sure that you submit a complete application.

## Format Requirements

Please prepare all documents in your Educator Portfolio to meet the format requirements listed below.

- <u>Standard templates for the Educator Portfolio must be used</u>
    - o Do not change the format of templates or margins, simply insert information
        - ▪ Remember to highlight the italicized prompts and suggestions and replace with your entries.
        - ▪ Be sure to complete the short header information at the top of each template that you include.

- Required for all membership applications:
    - Cover Page:  Choose appropriate template – Protégé or Faculty (all other membership categories).
    - Structured Personal Statement:  Choose appropriate template – Protégé or Faculty (all other membership categories).
    - Curriculum Vitae:  Any format is fine and be sure to include it first in the Appendix.
    - Letters of Support:  Follow the instructions for the specific membership category that you have selected.

- Required for Fellow, Master Teacher, and Teaching Scholar:
  Include sections for education domains you selected, using appropriate standard templates. Please refer to specific instructions for the membership category you selected.

- Organize the sections of your Educator Portfolio in the following order:
    1. Cover page
    2. Structured personal statement
    3. Selected education domains reflecting the following order:
        - Direct Teaching
        - Curriculum Development, Instructional Design, Assessment of Student Learning
        - Advising and Mentoring
        - Educational Leadership and Service
        - Educational Research
    4. Appendix – at a minimum, you must include your curriculum vitae (any format), followed by any other items you choose to include.
    5. Letters of support will be added to your portfolio application when they are received in the OMERAD

- Format for other Appendix items:
    - White, standard letter-sized page (8 ½  x 11 inches)
    - Single line spacing
    - Font style and size already set for templates;  for other items (e.g., tables or figures in appendix, please use standard styles and size $\geq$11 point  (e.g., Times New Roman, Arial, Arial Narrow)
    - Be sure Appendix items are clearly referenced by page number within the appropriate section(s) (e.g., Structured Personal Statement or any education domains).
    - When presenting description or evidence as tables, figures, representative examples, include these as an Appendix item. List the item in the appropriate Evidence cell of the template and be sure to reference the appropriate Appendix page number(s).
    - Label Appendix items clearly and include the same short header used on the portfolio templates.
    - Number Appendix pages sequentially as follows: A.1, A.2, A.3 and so on.

- Submit application portfolio as a single PDF to omerad@lsuhsc.edu
    - *Remember*:  Letters of support are submitted directly to the OMERAD.
    - Retain the original documents for your file.
    - If you have questions or need technical assistance, please email omerad@lsuhsc.edu .
    - *In unique or extenuating circumstances only*, a print/paper application portfolio may be submitted with prior approval from the Academy Director.  Requests should be sent to omerad@lsuhsc.edu.  If print/paper portfolio is submitted, only one stapled document may be submitted (use of notebook binders, binder clips, or rubber bands not allowed).

# General Instructions for Completing the Application/Educator Portfolio

Once your portfolio leaves your hands, its interpretation is dependent on how clear and complete you have been in your descriptions and presentation of evidence, as is the case with any published work.  Please use the general instructions below and those included for

the specific membership category that you selected when preparing your application. Also, discussions and sharing drafts of your portfolio with trusted colleagues can provide useful feedback and facilitate assembling an effective portfolio.

## *Cover Page (required)*

Please be sure to complete all sections accurately and clearly. For the sections pertaining to education domains, please follow instructions for the specific membership category you selected. You may include sections for as many of the five education domains as you like, but you should check on the Cover Page only those for which you wish your membership decision to be based.

## *Structured Personal Statement (required)*

The Structured Personal Statement is an essential component that provides the necessary background and context in which reviewers can assess and interpret everything else that is presented in the Educator Portfolio and the application packet, as a whole. Your personal statement must be completed using the required template (Protégé or Faculty) that is appropriate to your membership category. This statement should be clear and concise (usually not longer than 1-2 pages). For Protégé and Associate membership applications, this statement may be slightly longer and include more details, since separate sections for education domains are not required. The specific prompts and suggestions shown italicized in the template are provided to help you, but they are not all-inclusive. Finally, be sure that you have communicated clearly what you expect to gain from the Academy and how you intend to contribute to the Academy as a community of practice in teaching and education.

## *Sections for Selected Education Domains*

These sections are required in the Educator Portfolio for applications for the following member categories: Fellow, Master Teacher, and Teaching Scholar. On the Cover Page, you will have indicated the education domains on which you wish your membership application to be based. You may include sections for additional education domains in which you have some involvement and accomplishments for the purposes of providing a more complete representation of the breadth and depth of your engagement in teaching and education and obtaining feedback from peer reviewers regarding accomplishments and suggestions for how to further develop these domains.

You should include a section for each of the education domains that you have selected. Complete the corresponding templates and include any corresponding Appendix items that you decide are important. Within each of the templates, you will find additional instructions and suggestions that are highlighted. Prompts and suggestions for potential sources and forms of evidence are shown in the templates as italicized text. Please use these suggestions, then replace the italicized text with your own information (using regular font, not italics). Finally, because there may be some unavoidable overlap among the education domains (e.g., between teaching and instructional design or assessment activities), please cross-reference narrative descriptions, evidence, and appendix items as needed to avoid unnecessary repetition. In doing so, you should take care to provide clear and sufficient explanation of the evidence regarding the domain-specific aspects of your achievements. Cross references should be clearly noted (e.g., specific page numbers, appendix items, and CV entries). Below are a few additional points for guidance:

- Choose a format that affords you the best opportunity to present your evidence clearly and concisely.

- If you include a web address or access to interactive digital materials, be sure that such links or digital materials can be accessed and used effectively by peer reviewers. Be sure your description in the Evidence column is sufficiently clear and engaging to assure that reviewers will access the material.

- Strive to be selective, rather than exhaustive, and present your *best evidence* of teaching excellence, scholarly approach, and scholarship.

## *Appendix Items*

*Your curriculum vitae must be included as the first entry in the Appendix.* If you have other items to include in the Appendix, they should meet the format requirements outlined at the beginning of this section and be organized in the order in which they are first presented in the sections of your Educator Portfolio. Please limit the number of appendix entries to only those that are critical to presenting your evidence clearly and be sure to include specific page number references in the appropriate education domain section. Below are a few other points to consider when developing and selecting appendix items:

- Use tables, graphs, and charts to summarize your efforts and achievements, as appropriate, and include comparative results when available. Such presentation of information is often much more effective than lengthy narrative descriptions.

- If you have developed a completely new curriculum that is extensive and difficult to fully describe and/or appreciate its impact within the structure of the Narrative/Description or Evidence columns, or the curriculum example summary template, then you may want to include *selected*, *representative* excerpts and examples in the Appendix (e.g., overview diagram, schedule of curriculum objectives, list of topics, or one or two representative examples from the curriculum materials).

- If you have compiled evidence recently for another purpose (e.g., summary of contributions in teaching and education for promotion/tenure review using a school-required format), you are not required to re-format this information for the Academy membership application. In such instances, provide a clear description in the Narrative/Description column, list and reference the specific elements in the Evidence column that have been included in the Appendix.

## *Requesting Letters of Support*

Only <u>one</u> letter of support is required for all categories of membership, but you may solicit additional letters of support. In all instances, letters should be solicited from individuals who have first-hand knowledge of your activities and achievements. When requesting a letter, please provide the individual with the necessary descriptions and standards and communicate clearly your reason(s) for asking for their input. An individual letter does not need to focus on all aspects or criteria, but should reflect those areas for which the letter writer has the best opportunities to witness evidence of Quantity, Quality, and/or Engagement for the category of membership and the education domain(s) that you have selected. If you are soliciting only one letter to include in your application, then strive for one that can provide the most comprehensive perspective regarding the criteria for the membership category you have selected. A few suggestions for soliciting letters of support have been included on the specific instruction sheet for the membership category that you selected, but you are not limited to these choices.

Individuals providing letters of support should send them directly to the OMERAD via PDF attachment to an email message to [omerad@lsuhsc.edu](mailto:omerad@lsuhsc.edu), by fax to the attention of Mrs. Kelly Nester (504-599-1453), or postal or campus mail to the address below:

> Office of Medical Education Research and Development
> Academy for the Advancement of Educational Scholarship
> Louisiana State University Health Sciences Center
> 2020 Gravier Street, Suite 657
> New Orleans, Louisiana 70112

## *Other Resources to Guide Developing Your Educator Portfolio*

Additional information and examples of how to present evidence of Quantity, Quality, and Engagement in various education domains can be found in the summary report for the AAMC Group on Education Affairs 2006 Consensus Conference on Educational Scholarship, *Advancing Educators and Education: Defining the Components and Evidence of Educational Scholarship* (July 2007) (especially pages 19-34). The complete report is available as a PDF from the following sources:
- LSUHSC-NO Academy:
  ([http://www.medschool.lsuhsc.edu/medical_education/Academy/omerad-academy.asp](http://www.medschool.lsuhsc.edu/medical_education/Academy/omerad-academy.asp)).
- AAMC:
  [https://services.aamc.org/publications/index.cfm?fuseaction=Product.displayForm&prd_id=196&cfid=1&cftoken=A06BFE28-A93C-8581-F7F069A610E544F7](https://services.aamc.org/publications/index.cfm?fuseaction=Product.displayForm&prd_id=196&cfid=1&cftoken=A06BFE28-A93C-8581-F7F069A610E544F7)

# Specific Instructions and Checklist for Each Membership Category

The hardest part of assembling your application portfolio is getting started.  Beginning on the next page is an instruction sheet containing specific requirements and application of criteria for each of the five membership categories.  Select the document set that corresponds to the membership category you have selected and use this to help you get started with your membership application.  For assistance, call 504-568-2140 or send an email request to omerad@lsuhsc.edu and check the Academy website for workshops.

## *Protégé Application: Instruction Sheet*

The *Protégé* membership category provides opportunities for residents, clinical fellows, post-doctoral, and doctoral students to engage in the Academy with sponsorship and mentoring support of Academy members. This membership category will be particularly well-suited for advanced learners who are interested in teaching and/or contemplating an academic career in health professions education.

### *Eligibility Requirements:*
- Resident, Fellow, Post-doc, Doctoral student enrolled and in good standing in a LSUHSC-New Orleans educational program
- Commitment of at least one Academy member as sponsor/mentor

### *Criteria and Evidence:*
Applicants must complete the Academy Protégé Cover Page and Structured Personal Statement in consultation with the Academy Sponsor(s). Responses to prompts in the Structured Personal Statement should include specific attention to the education domain(s) marked on the Cover Page and in terms of the criteria outlined below.

| | |
|---|---|
| *Quantity:* | • Evidence of active involvement and/or specific plans to participate in teaching and education at LSUHSC <br> • Clear indication of intended participation in the Academy and in a mentoring relationship with at least one Academy member |
| *Quality:* | • Clear description of a specific focus and/or professional development goal(s) in at least one of the five education domains <br> • Clear description of how membership and participation in the Academy and mentoring, including any specific activities or special project will contribute to the identified focus area and/or goal(s) in teaching and education |
| *Engagement:* | • Clear evidence that the applicant and Academy sponsor(s) have established a solid commitment to a mentoring relationship <br> • Clear evidence that the Educator Portfolio was completed in collaboration with the Academy sponsor(s) <br> • Clearly articulated expectations and anticipated benefits of membership in the Academy <br> • Clear description of intended participation in and contribution to the Academy as a community of educators |

Please use the checklist on the next page to guide assembling and submitting your Protégé membership application.

## *Protégé Application: Checklist*

*Educator Portfolio that includes the following:*

☐ Cover Page (Protégé template)
☐ Personal Statement (Protégé template)
☐ Curriculum Vitae (any format) – required Appendix item

Protégé templates are available at the Academy website: ([http://www.medschool.lsuhsc.edu/medical_education/Academy/omerad-academy.asp](http://www.medschool.lsuhsc.edu/medical_education/Academy/omerad-academy.asp)).

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*One Letter of Support (required), but others may be included. Sources are your choice. Below are a few suggestions:*

- Direct supervisor (e.g., program director) – *first-hand* knowledge of involvement and interests in teaching and education, commitment to supporting the applicant's participation in the Academy and the Academy mentor/protégé relationship.

- Academy sponsor(s)/mentor(s) –evidence of the sponsor/mentor's commitment to the protégé/mentor relationship and the preliminary goals or shared interests that will facilitate and/or guide their work together. If more than one Academy member has agreed to serve as sponsor/mentor, you may request separate letters or ask them to collaborate to submit one, jointly signed letter.

NOTE: All letters must be submitted directly to the OMERAD (hard copy or PDF to omerad@lsuhsc.edu). Sometimes it takes a while to receive letters, so please ask for these early in the process to allow sufficient time.

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*Assembling and submitting your application:*

☐ Use required templates and follow format requirements (more details at beginning of Section 4).
☐ Assemble your materials in the order indicated above for the Educator Portfolio (minus the letters of support).
☐ Signatures and date on the forms
☐ Single PDF of the complete application
☐ Submit application as a PDF attachment to an email message sent to [omerad@lsuhsc.edu](mailto:omerad@lsuhsc.edu)

If you need assistance, please contact the OMERAD (504-568-2140, [omerad@lsuhsc.edu](mailto:omerad@lsuhsc.edu)).

## *Associate Application: Instruction Sheet*

The *Associate* member category is available to all LSUHSC faculty members at <u>any point following their initial date of hire</u>.  This category of membership facilitates broad, inclusive engagement of faculty members in the Academy as an inter-professional community of educators.  Associate members must be actively involved at LSUHSC in at least one of the education domains and demonstrate goal or purpose-directed intentions for participating in the Academy, appropriate to their career stage and current involvement in teaching and education.  Examples include the following:

- New faculty members may want to focus on faculty development activities to develop knowledge and skills in teaching and education and/or seek mentorship for engaging in educational scholarship.  In addition, early engagement of new faculty members facilitates their professional development and preparation for seeking Academy membership as a Fellow when they reach their second anniversary of hire.

- Faculty members at various stages of their careers (e.g., junior, mid-career, senior) may seek membership in the Academy to demonstrate support for the Academy mission, mentor Protégés or colleagues in teaching, and/or explore or learn about educational scholarship.  Some may want to experience the Academy before making a decision about applying for a different member category.  In other circumstances, some faculty members who are engaged in teaching and education, but whose primary responsibilities or scholarly interests are outside of teaching and education, may find the Associate member category an optimal choice for their professional situation.

For new faculty members, narrative/description and evidence included in application may reflect interest and intentions more than past accomplishments, since these may be limited.  Experienced and senior faculty members should emphasize current involvement and contributions, past achievements, and particular interests and intentions for becoming engaged in the Academy.

### *Eligibility Requirements:*
- LSUHSC-NO faculty
- Actively involved at LSUHSC in $\geq 1$ of the five education domains

### *Criteria and Evidence:*
The Educator Portfolio for the Associate membership application reflects an abbreviated Educator Portfolio that does not include detailed sections for selected education domains.  Applicants must complete the Academy Cover Page and Structured Personal Statement using the templates for faculty memberships.  Responses to the prompts for the Structured Personal Statement should include specific attention to the education domain(s) marked on the Cover Page and in terms of the criteria outlined below.

| *Quantity:* | • Evidence of active involvement and/or specific plans for expanding involvement in at least one education domain at LSUHSC |
|---|---|
| *Quality:* | • Evidence of effectiveness and excellence and/or description of a specific focus or goal(s) to enhance quality and education<br>• Clear and appropriate rationale that demonstrates how Academy membership and participation in Academy activities will contribute to pursuing a specific focus and/or achieving stated goal(s) in teaching and education |
| *Engagement:* | • Clearly articulated expectations and anticipated benefits of membership in the Academy<br>• Clear description of intended participation in and contribution to the Academy as a community of educators |

Now go to the next page and use the checklist to assemble and submit your Associate membership application.

## *Associate Application: Checklist*

*Educator Portfolio that includes the following:*

☐ Cover Page (Faculty template), be sure to check education domains reflecting current involvement and interests
☐ Personal Statement (Faculty template)
☐ Curriculum Vitae (any format) – required Appendix item

Templates in Microsoft Word are available at the Academy website: (http://www.medschool.lsuhsc.edu/medical_education/Academy/omerad-academy.asp).

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*One Letter of Support (required), but others may be included. Sources are your choice. Below are a few suggestions:*

- Direct supervisor (e.g., Dean, Associate Dean, department chair, section chief, program/center director) – *first-hand* knowledge of involvement and interests in teaching and education, commitment to supporting the applicant's participation in the Academy

- Peer/Colleague at LSUHSC – first-hand knowledge of involvement, interests, and achievements (as applicable) in teaching and education; may be within or outside your LSU-affiliated department, office, or program in which you are primarily engaged in teaching and education.

NOTE: All letters must be submitted directly to the OMERAD (hard copy or PDF to omerad@lsuhsc.edu). Sometimes it takes a while to receive letters, so please ask for these early in the process to allow sufficient time.

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*Assembling and submitting your application:*

☐ Use required templates and follow format requirements (more details at the beginning of Section 4).
☐ Assemble your materials in the order indicated above for the Educator Portfolio (minus the letters of support).
☐ Signatures and date on the forms
☐ Single PDF of the complete application
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# Fellow, Master Teacher and Teaching Scholar Applications: Instruction Sheet

Academy membership as a *Fellow*, *Master Teacher*, or *Teaching Scholar* provides opportunities for recognition and ongoing faculty professional development in teaching and educational scholarship. Faculty members who pursue one of these membership categories have demonstrated sustained involvement and excellence in at least one of the five education domains, have established engagement with others to pursue teaching and education as scholarly work and/or already achieved educational scholarship at some level. Many faculty members who pursue one of these three member categories devote significant time and effort to the teaching and education mission and their engagement reflects a prominent area of their academic scholarly activity.

## *Eligibility Requirements:*

| | |
|---|---|
| *Fellow* | • LSUHSC-NO faculty $\geq$ 2 years<br>• Engagement and evidence of excellence $\geq$ 1 domains |
| *Master Teacher* | • LSUHSC-NO faculty $\geq$ 2 years<br>• Engagement, excellence, and scholarly approach $\geq$ 2 domains<br>• $\geq$ 1 scholarly publication/dissemination in education |
| *Teaching Scholar* | • LSUHSC-NO faculty $\geq$ 2 years<br>• Excellence and scholarly approach $\geq$ 3 domains<br>• Record of scholarly publication/dissemination<br>• Regional, national, and/or international recognition for scholarship in teaching and education |

## *Criteria and Evidence:*

For the Fellow, Master Teacher, Teaching Scholar member categories, a full Educator Portfolio is required. In addition to the required Cover Page and Structured Personal Statement, a section is required for each of the education domains checked on the Cover Page on which review of the application for the selected membership category is based. Applicants may include sections for any of the other education domains to present a complete scope of teaching and education and/or to obtain feedback from peer reviewers. Applicants receive feedback from peer reviewers on all sections/domains that are included in the portfolio. Required and supplemental/optional templates for each education domain are available at the Academy website. Narrative/description and evidence provided in the application must address the specific expectations for each of these three member categories, as outlined below:

*Fellow* – Evidence in <u>at least one</u> of the five education domains that reflect the following:

| | |
|---|---|
| *Quantity:* | Evidence of active involvement in teaching and education at LSUHSC |
| *Quality:* | Evidence of effectiveness and excellence (processes and outcomes) in the selected domain(s). |
| *Engagement:* | Evidence of engagement with the educational community at least at the local level (e.g., participation in faculty development activities, self-directed efforts, collaboration with colleagues to continuously enhance knowledge/skills and to facilitate and enhance effectiveness, excellence, and innovation in teaching and education). |

*Master Teacher* – Evidence in <u>at least two</u> of the five education domains beyond the expectations of Fellow that reflects the following:

| *Quantity:* | Substantial involvement in <u>at least two</u> of the five education domains.  Overall, evidence reflects at least two settings (e.g., lecture, small group, one-on-one, distance learning, and/or clinical) and/or with at least two types of learners (e.g., medical students and residents). |
|---|---|
| *Quality:* | Evidence representing a consistent record of excellence over time in the different settings and/or with the different types of learners. |
| *Engagement:* | Evidence of engagement with the educational community will reflect a *Scholarly Approach* in each of the selected education domains **and** <u>at least one example</u> of *Educational Scholarship* at a local, regional, national, or international level.  Examples of *scholarship* might include invited presentations at faculty meetings or Grand Rounds; dissemination of teaching methods, curriculum or educational materials that others have adopted or adapted; publication of educational materials in MedEdPORTAL (http://www.aamc.org/mededportal); or traditional forms of publication that reflect the science and practice of one's teaching and education.<br><br>**NOTE:**  Successful candidates for Master Teacher may have already completed an educational fellowship program at another institution or through affiliation with a professional organization. |

*Teaching Scholar* **–** Evidence in <u>at least three</u> of the five education domains beyond the expectations of Master Teacher that reflects the following ways:

| *Quantity:* | Evidence of sustained, extraordinary involvement in teaching and education at LSUHSC.  Evidence will include various types of activities and a record of frequency and duration that represents a strong commitment to teaching and education. |
|---|---|
| *Quality:* | Evidence of a consistent record of extraordinary excellence (e.g., highly effective, innovative) in multiple settings and over time. |
| *Engagement:* | Evidence that reflects a consistent record of *Scholarly Approach* <u>and</u> *Educational Scholarship* that extends beyond the local level <u>and</u> includes peer recognition as a scholarly teacher and educator at the regional national, and/or international level.  Educational scholarship may include, but not be limited to, invited and peer-reviewed presentations and publications, consultations, collaborations, and dissemination of innovative educational materials, strategies, and programs that have been used or built upon by others. |

## *Fellow, Master Teacher and Teaching Scholar Applications: Checklist*

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*Educator Portfolio*

☐ Cover Page
☐ Personal Statement
☐ Sections for Selected Education Domains
☐ Appendix: Required entry -- Curriculum Vitae (any format)
☐ Appendix:  Optional entries -- supporting documentation for selected domains, as needed

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*One Letter of Support (required), but others may be included.  Sources are your choice.  Below are a few suggestions:*

- Direct supervisor – person who has supervisory responsibility for your activities at LSUHSC (e.g., dean, associate dean, department head, section chief, program/center director)

- Peer/Colleague within department/program in which you primarily engage teaching and education activities; and

- Peer/Colleague outside department in which you primarily engage in teaching and education activities or from another institution or a former student or protégé (e.g., undergraduate, graduate, resident, fellow).

Your required letter of support and any others you wish to include should be solicited from people who have *first-hand* knowledge of your involvement, achievements and contributions in teaching and education, and as appropriate for the selected membership category, the extent to which your achievements and contributions have been recognized at the local, regional, national, and/or international levels.

**NOTE**:  All letters must be submitted directly to the OMERAD (hard copy or PDF to omerad@lsuhsc.edu).   Sometimes it takes a while to receive letters, so please ask for these early in the process to allow sufficient time.

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*Assembling and submitting your application:*

☐ Use required templates and follow format requirements (more details at the beginning of Section 4).
☐ Assemble your materials in the order indicated above for the Educator Portfolio (minus the letters of support).
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If you need assistance, please contact the OMERAD (504-568-2140, omerad@lsuhsc.edu).

# Selected References and Resources

AAMC. (2008). MedEdPORTAL Scholarship Guides. http://services.aamc.org/jsp/mededportal/goLinkPage.do?link=scholarship (Accessed 4/10/2008).

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Fincher, R. E., Simpson, D. E., Mennin, S. P., Rosenfeld, G. C., Rothman, A., McGrew, M. C., Hansen, P. A., Mazmanian, P. E., Turnbull, J. M. (2000). Scholarship in teaching: An imperative for the 21st century. *Academic Medicine*, 75*(9),* 887-894.

Glassick, C. E. (2000). Boyer's expanded definitions of scholarship, the standards for assessing scholarship, and the elusiveness of the scholarship of teaching. *Academic Medicine*, 75*(9),* 877-880.

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