

INTERNATIONAL ASSOCIATION OF MEDICAL SCIENCE EDUCATORS (IAMSE) EDUCATOR EVALUATOR ASSESSMENT GUIDE

This assessment guide was created by the members of the Committee for the Advancement of Medical Science Educators (CAMSE), a subcommittee of the IAMSE Professional Development Committee (2019):

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Introduction to the guide

Medical educator appointment tracks are becoming more common in medical education to provide a career path for faculty with predominant roles in helping medical schools fulfill their educational mission. For institutions that consider medical education as a viable career track, it is important to recognize and reward faculty who demonstrate a scholarly approach to teaching and their contributions to knowledge in medical education (i.e., scholarship). The IAMSE Evaluator Toolkit was designed to provide guidance for those in leadership roles including members of appointment, promotion, and tenure committees, department/division chairs, and teaching academy leaders to help them become effective evaluators of faculty appointed to a medical education track. The overarching aim of the IAMSE Evaluator Toolkit is to improve evaluators' understanding of the international criteria by which medical science educators are evaluated and the "best practice" tools used for evaluation. This toolkit, designed in parallel with the IAMSE Educator Toolkit (available on IAMSE website), was created by consulting the relevant literature on the evaluation of educational portfolios, reviewing data from an international survey of the IAMSE membership¹, and examining common evaluation practices at several medical schools. The three steps below will guide you through the process of using this toolkit to effectively evaluate faculty appointed to a medical education track with predominant roles as educators.

Step 1: Understanding your organization's promotion/tenure criteria

The requirements for academic advancement of faculty are based on individual institutional criteria and standards. It is important for those tasked with evaluating faculty for promotion and tenure to understand the intricacies of these standards at their own institution. At many schools, excellence in teaching, service, and scholarship are the cornerstones for advancement, and the degree to which institutions prioritize these activities will vary. For example, a limited contribution to teaching will suffice for promotion/tenure at some institutions, while demonstration of a significant commitment to teaching with evidence of a scholarly approach and/or scholarship may be required by other institutions. Another common criterion for advancement is faculty reputation in their field of expertise (e.g., local, regional, national, or international) as demonstrated by presentations at meetings, invitations to present at other institutions or conferences, and collaboration with educators at other schools. Understanding your institution's criteria for faculty appointment, promotion to different faculty ranks, and tenure is critical.

Step 2: Understanding the criteria for promotion/tenure of faculty appointed to a medical education track

At most medical schools, the *curriculum vitae* (CV) is one of the most important documents for evaluating faculty for the purposes of promotion and/or tenure. According to *Leadership Lesson: the Educator Portfolio*: "An Educator portfolio is a written document that describes and details the strengths of an educators teaching and educational innovations"². Educator Portfolios (EPs) have emerged as tools to facilitate the evaluation of a medical educator's CV, which differs from the CV of faculty assigned to research tracks in several important ways. First, faculty assigned to education tracks often have significant roles in teaching and educational scholarship that are not well represented by the traditional CV, which are designed to capture research productivity and grant funding. By contrast, EPs are designed to highlight significant contributions to teaching, curriculum development, learner evaluation, mentoring and advising, and leadership & administration, which are additional important roles of medical educators that may not be

required of faculty appointed to research tracks. The IAMSE Educator Toolkit is designed to capture faculty contributions to these important activities that may not be visible within a traditional CV, and the Evaluator Guide is designed to facilitate the evaluation of these educator activities. It is therefore important to integrate the content of a faculty member's CV with the content provided in the EP.

Another important consideration for faculty appointed to an education track relates to the norms of publishing in medical education journals. Many medical education journals have significantly lower impact factors than biomedical science journals. For example, several leading medical education journals have impact factors in the range of 4-5 while several leading biomedical science journals have impact factors over 30. In addition to differences in journal metrics, there is no consensus on author order with respect to author contribution in medical education journals. In contrast to biomedical science research journals where the first author typically denotes the individual who most contributed to the work with the last author denoting the senior author, this order may be reversed in some medical education journals (i.e., senior author is the first author). Other journal metrics such as the publication acceptance rate, number of article downloads or views, and the number of accepted manuscripts per year may vary significantly from those of biomedical science journals. For these reasons, it is important to interpret such data carefully and fairly.

Step 3: Defining 'scholarly approach' and 'scholarship' in medical education

According to the AAMC Consensus Conference report, a scholarly approach is taken when "faculty systematically design, implement, assess, and redesign an educational activity, drawing from the literature and 'best practices' in the field. Documentation describes how the activity was informed by the literature and/or best practices."³ A scholarly approach can lead to dissemination of work, or scholarship. In Glassick, Huber, and Maeroff's *Scholarship Assessed* (1997)⁴, work is considered scholarship if it includes the following components:

1. Clear goals
2. Adequate preparation
3. Appropriate methods
4. Significant results
5. Reflective critique

The AAMC Consensus Conference report states: "Faculty engage in educational scholarship by both drawing upon resources and best practices in the field and by contributing resources to it. Documentation begins by demonstrating that an educational activity product is publicly available to the educational community in a form that others can build on."³ For example, an educator may demonstrate scholarship in an area of concentration by publication in a medical education journal or repository, presentation in the form of a workshop or focus session, or publication of a curriculum piece into a national repository. More simply stated, an activity or product is considered scholarship if it is made public, peer-reviewed, and a platform for others in the field to build upon. For this reason, the category of "effective presentation" is sometimes added as a sixth criteria to Glassick's criteria, and the EP provides documentation of peer-review, presentation, and/or dissemination of an educator's work.

References:

1. Bonny L. Dickinson, Nicole Deming, Lisa Coplit, Kathryn N. Huggett, Kelly Quesnelle, Gary Rosenfeld, Maria Sheakley, and Stephanie Wragg. IAMSE Member Perspectives on the Recognition, Reward, and Promotion of Medical Science Educators: An IAMSE Sponsored Survey. *Medical Science Educator*. 28(2): 335-343, 2018
2. Leadership Lesson: The Educator Portfolio: A Tool for Career Development. By Constance D. Baldwin, Ph.D., Maryellen Gusic, M.D., and Latha Chandran, M.D., M.P.H.
3. Association of American Medical Colleges (AAMC) Group on Educational Affairs Consensus Conference on Educational Scholarship. *Advancing Educators and Education: Defining the Components and Evidence of Educational Scholarship*; 2007.
4. Glassick, C. E., M. T. Huber, and G. I. Maeroff. 1997. *Scholarship Assessed, Evaluation of the Professoriate*. An Ernest L. Boyer Project of the Carnegie Foundation for the Advancement of Teaching. Jossey-Bass. San Francisco. (Memorial Library Call Number: LB 2332 G63 1997 c.2).

Additional Resources:

1. Gusic M. Educator Portfolio Template of the Academic Pediatric Association's Educational Scholars Program. *MedEdPORTAL* 2007.
2. Simpson D, Marcdante K, Fenzel J. The educator's portfolio & curriculum vitae - workshop & resource guide. *MedEdPORTAL*. 2007;3:677. https://doi.org/10.15766/mep_2374-8265.677
3. AAMC Toolbox for Evaluating Educators. Gusic M et al. *MedEdPORTAL*
4. Baldwin, C, Chandran, L, & Gusic, M. Educator evaluation guidelines. *MedEdPORTAL*, 2012. Available from: www.mededportal.org/publication/9072.
5. Gusic M, Amiel J, Baldwin C, et al. Using the AAMC toolbox for evaluating educators: you be the judge! *MedEdPORTAL*. 2013;9:9313. https://doi.org/10.15766/mep_2374-8265.9313
6. Gusic M, Chandran L, Balmer D, D'Alessandro D, Baldwin C. Educator portfolio template of the academic pediatric association's educational scholars program. *MedEdPORTAL*. 2007;3:626. https://doi.org/10.15766/mep_2374-8265.626
7. Simpson D. et al. *Advancing Educators and Education by Defining the Components and Evidence Associated with Educational Scholarship*. *Medical Education* 2007;41:1002–1009.

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Name of Educator for Promotion or Tenure:

Promotion Track (Assistant, Associate, Full):

Reviewer (your name):

Date of Review:

Standards and Criteria for Promotion

Add your institution's criteria for the educators' promotion track here

How to use this worksheet:

Use the three rating categories described below to evaluate the educator in each of the five domains of educator activities: teaching, learner assessment, curriculum development, advising and mentoring, and educational leadership and administration. For a more detailed description of these activities, refer to the worksheets in the Educator Toolkit.

1. Description – The educational activity is clearly described and goals are well defined. The role of the educator is clearly stated. You are able to determine who, what, when, where, how often and how much time is devoted to the activity. There is evidence of significant dedication of time and effort to the activity.
2. Scholarly Approach – The educator uses a scholarly approach to guide the design and development of educational activities. The educator uses an informed approach to developing all aspects of the activity (e.g. learning objectives, instructional methods, etc.). The educator assesses the activity and ideally, demonstrates improved outcomes. A process for continuous improvement using evaluation and reflection is evident.
3. Scholarship/Dissemination – An educator may demonstrate scholarship in his/her area of expertise through peer review and dissemination of educational contributions to the larger educational community. Forms of dissemination include, but are not limited to, publication in journals, books, or online collections; presentation in the form of a workshop at a regional, national, or international meeting; adoption of one's work by another department or institution; or acceptance of an educational product into a national repository such as MedEdPORTAL. Only "accepted" publications/presentations should be considered.

Teaching

Teaching is any activity that fosters learning. Educators may engage in teaching by giving lectures, facilitating small group discussions or lab groups, teaching on clinical rounds, etc. In this category, educators should document the quantity and quality of their teaching, their specific role(s), a scholarly approach to the process of teaching, and any dissemination of work in the domain of teaching.

Rating Category	Supporting Evidence			
	Insufficient	Sufficient	More than Sufficient	Unable to Assess
Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scholarly Approach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scholarship/Dissemination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<div>Comments:</div> <div><input type="checkbox"/> Meets criteria for promotion based upon this category <input type="checkbox"/> Does not meet criteria for promotion based upon this category <input type="checkbox"/> Requires further discussion</div>				

Learner Assessment

Learner assessment is defined as all activities associated with measuring learners' knowledge, skills, and attitudes. To assess excellence in this category, educators are asked to describe how they developed, implemented, analyzed, and synthesized an assessment project, including any dissemination of work in the domain of learner assessment.

Rating Category	Supporting Evidence			
	Insufficient	Sufficient	More than Sufficient	Unable to Assess
Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scholarly Approach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scholarship/Dissemination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments: <div> <input type="checkbox"/> Meets criteria for promotion based upon this category <input type="checkbox"/> Does not meet criteria for promotion based upon this category <input type="checkbox"/> Requires further discussion </div>				

Curriculum Development

Curriculum development refers to the creation of a longitudinal set of educational activities and is to be differentiated from creation of a single educational event. Examples may include a basic science lecture series, a set of clinical reasoning cases, a series of clinical skill workshops, faculty development workshops, etc. A curriculum must have goals, teaching methods appropriate for those goals, an informed approach to the design, a means of assessment of its effectiveness, and ongoing improvement based upon the evaluation results. In this category, the educator is asked to describe each of these aspects of the curricula they have developed and any dissemination of work in the domain of curriculum development.

Rating Category	Supporting Evidence			
	Insufficient	Sufficient	More than Sufficient	Unable to Assess
Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scholarly Approach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scholarship/Dissemination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments: <div style="border: 1px solid black; height: 400px; margin-top: 10px;"></div> <div style="margin-top: 20px;"> <input type="checkbox"/> Meets criteria for promotion based upon this category <input type="checkbox"/> Does not meet criteria for promotion based upon this category <input type="checkbox"/> Requires further discussion </div>				

Advising and Mentoring

An advisor serves an advisee in a focused capacity to help him/her with a decision or course of conduct, or to provide suggestions for a specific project. A mentor helps a mentee to achieve his/her personal and professional goals by providing guidance, support, and the creation of opportunities for the mentee. This requires an ongoing, committed relationship with clear goals to help the mentee achieve their own definition of success. Assessing the quality of an educator's contribution in this category means determining whether the advisor/mentor has helped the learner meet defined goals. In this category, the educator is asked to describe their role in facilitating advisees/mentees success and asked to provide evidence of a scholarly approach to this important means of teaching, and any dissemination of work in the domain of advising/mentoring.

Rating Category	Supporting Evidence			
	Insufficient	Sufficient	More than Sufficient	Unable to Assess
Description	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scholarly Approach	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Scholarship/Dissemination	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
Comments: <div style="border: 1px solid black; height: 300px; margin-top: 10px;"></div> <div style="margin-top: 10px;"> <input type="checkbox"/> Meets criteria for promotion based upon this category <input type="checkbox"/> Does not meet criteria for promotion based upon this category <input type="checkbox"/> Requires further discussion </div>				

Effective leaders in education transform educational programs and advance the field. They should seek ongoing excellence, evaluate outcomes, disseminate results, and maximize resources. To assess excellence in this category, educators are asked to describe the initiatives they have led in their roles, the impacts and improvements these initiatives have made, and any dissemination of work in the domain of educational leadership and administration.

☐ Meets criteria for promotion based upon this category
☐ Does not meet criteria for promotion based upon this category
☐ Requires further discussion

Philosophy of Education and Long Term Goals

The educator adequately describes the principles that guide their work as an educator and their specific interests and career goals as an educator, including any professional development programs they have participated in to improve their work as an educator.

- ☐ Agree
- ☐ Disagree
- ☐ Unsure

Comments:

Overall Recommendation

- ☐ Meets criteria for promotion
- ☐ Does not meet criteria for promotion
- ☐ Requires further discussion

Comments about your overall recommendation: