

# UCLA

## UCLA Previously Published Works

### Title

A guide to creating an educators portfolio for the 21st century.

### Permalink

<https://escholarship.org/uc/item/7wq258bw>

### Journal

Aem Education and Training, 8(1)

### Authors

Krzyzaniak, Sara

Coates, Wendy

Gottlieb, Michael

### Publication Date

2024-02-01

### DOI

10.1002/aet2.10931

Peer reviewed

## EDUCATOR'S BLUEPRINT

# A guide to creating an educator's portfolio for the 21st century

Sara M. Krzyzaniak MD<sup>1</sup>  | Wendy C. Coates MD<sup>2</sup>  | Michael Gottlieb MD<sup>3</sup> 

<sup>1</sup>Department of Emergency Medicine, Stanford University, Palo Alto, California, USA

<sup>2</sup>Department of Emergency Medicine, University of California Los Angeles, Los Angeles, California, USA

<sup>3</sup>Department of Emergency Medicine, Rush University Medical Center, Chicago, Illinois, USA

### Correspondence

Sara M. Krzyzaniak, Department of Emergency Medicine, Stanford University, Palo Alto, CA 94025, USA.  
Email: [skrzyz@stanford.edu](mailto:skrzyz@stanford.edu)

### Abstract

An educator's portfolio is (EP) a collection of materials for demonstrating and assessing a clinician educator's performance and perspective. Although not all academic institutions require faculty to maintain an EP, it can serve as a valuable tool for both personal reflection and professional advancement. With newer advancements in technology and social media, there are also opportunities to enhance the EP for the digital era. This educator's blueprint highlights eight strategies for creating an EP for the 21st century clinician educator: use your educator's philosophy to introduce and anchor your EP, apply broad definitions of scholarship, include pertinent metrics for all scholarly products, describe mentorship activities, incorporate self-assessment and the assessments from others, report comprehensive accounting of presentations, highlight leadership activities, and utilize technology to facilitate dissemination and sharing of your EP.

## INTRODUCTION

The educator's portfolio (EP) can complement the curriculum vitae (CV) by providing greater insight into a clinician educator's teaching philosophy, teaching methods, professional development, academic productivity (beyond publication metrics), and assessment of teaching effectiveness using course evaluations and learner-generated data.<sup>1</sup> The growth of technology and social media in the 21st century further allows for the creation of an online EP that is easily accessible by peers, collaborators, and potential employers. The medical education community has also seen a dramatic increase in virtual communities of practice (vCoP). These are groups that form around a common interest and utilize technology and virtual platforms for real-time or asynchronous discussion and experiential growth. Clinician educators can likewise harness technology to create, maintain, and share an EP to broaden the vCoP.<sup>2</sup>

The EP, which serves as a more detailed repository for academic work (e.g., lectures, curricula, mentorship) than what exists in your CV alone, can facilitate important reflection. The EP allows for reflection on your niche and career path. Consider questions such as,

“where should I be more engaged?” “am I missing a group of learners?” and “what is my educational philosophy?” This reflection can serve to facilitate goal setting and is also an important tool to combat imposter syndrome.<sup>3</sup> Just as the EP can facilitate personal reflection, it can also serve as a scaffold for meetings with your mentor(s) to guide career development. This reflection and commitment to personal growth is a pillar of the clinician educator milestones.<sup>4</sup> The EP can help mentors direct your efforts toward activities that build on past work as well as fill gaps in the current portfolio and ensure you are progressing through the levels of relevant clinician educator milestones.<sup>4</sup>

Another reason to maintain an EP is for external purposes. You may wish to submit your EP when applying for a new job, leadership position, or award. Additionally, the EP can serve an important role in your annual performance review with departmental or institutional leadership and even to negotiate a raise or protected time. The EP provides greater detail to the reader (e.g., prospective employer, department chair) about important aspects of your roles or programs you developed that are not well described in your CV. This is particularly important for faculty whose institutions do not

Presented at the Society for Academic Emergency Medicine Annual Meeting, May 2021 (delivered virtually due to COVID-19 restrictions).

Supervising Editor: Sorabh Khandelwal

© 2023 by the Society for Academic Emergency Medicine.

have a dedicated academic track specifically for clinician educators whose focus may be on clinical/didactic teaching and education scholarship. For these individuals, the EP can provide insight into the quality and impact of scholarly activities that fall outside the typical metrics observed by research-focused faculty. Many institutions require the detailed information typically included in an EP as part of their promotion and tenure process even if they do not explicitly require an EP be submitted.<sup>5</sup> The EP for the 21st century educator may also include a detailed report of online productivity (e.g., free open-access medical education [FOAM]). These activities are often not well delineated in traditional promotion and tenure frameworks; however, there is an increasing body of literature supporting the use of these activities in promotion decisions.<sup>6,7</sup> It is reasonable to assume that providing the EP along with your promotions dossier may enhance the peer review process, especially in this area. At a minimum, your EP can serve as a guide to writing required statements and collating important activities when preparing your dossier.

Some institutions maintain their own EP format, dictating the structure and content that should be included. However, other faculty may be at institutions that do not have a standardized EP and do not receive formal support in building their EP. These faculty may lack clarity both on what to include and on how to disseminate the EP to build their vCoP, increase the visibility of their work, and grow their mentorship network. This blueprint was informed by a review of the literature<sup>8-10</sup> and the combined experience of the authors who have held numerous education leadership roles requiring not just maintenance of their own EPs but mentorship and guidance for junior faculty and trainees who are creating their own EP. This guide may be used for educators building their EP *de novo* or for faculty who wish to advocate for a more rigorous structure of an existing EP at their institution.

## EIGHT STRATEGIES

### Use your educator's philosophy to introduce and anchor your EP

Creating a philosophy statement for an EP can resemble goal-driven personal statements such as those written in the residency application process. Many of the same considerations for sharing personal insights and perspectives are applicable<sup>11</sup>; however, the EP does not have the same constraints as a structured statement. A philosophy statement is much like a mission statement for a corporate or non-profit entity which defines the *raison d'être* in an action-oriented manner.<sup>12</sup> The EP philosophy statement can encapsulate educational goals, describe preferred teaching or assessment methods for yourself and your learners, highlight core values that drive your teaching and creative endeavors, and provide insight into what motivates you to excel.<sup>13</sup> Many people explicitly outline their professional development plans for the short and long term in this section. The philosophy statement should be concise and should serve as the introduction to

the EP. Capitalizing on social media and online repositories, your philosophy statement can be shared with a wider audience, leading to connections with potential collaborators. As you grow into your role as an educator and clinician, your philosophy may evolve, requiring the statement to be updated. The cadence of these updates depends upon the stage of your career or the intended use of the EP.

### Apply broad definitions of scholarship to identify what is included

Clinician educators should use the broader definition of scholarship as defined by Boyer,<sup>14</sup> which includes discovery, integration, application, and teaching. Although all education research should be included, the "scholarship of teaching" particularly applies to clinician educators who are building an EP. Typically these works meet the following criteria: (1) the work is made public, (2) the work is available for peer review, and (3) the work is reproducible.<sup>15</sup> Alternate forms of scholarship, such as curricula and training documents, can also be included, even if they do not meet Boyer's strict definition. These works should include dissemination and assessment details. In addition, other scholarly products published in blogs, podcasts, and other FOAM resources should also be included in the EP. Utilizing established definitions of scholarship,<sup>14</sup> standards of educational excellence,<sup>16</sup> and defined educator roles<sup>17</sup> facilitates standardization of the EP and rigor of an application for academic promotion.<sup>18</sup>

### Include pertinent metrics for all scholarly products

The EP is an ideal tool for providing a more in-depth demonstration of the impact and reach of your scholarly efforts. Peer-reviewed publications can be listed along with an account of your contribution and the stages the authors were involved in (e.g., data collection, analysis, manuscript preparation). As FOAM is gaining recognition within promotion and tenure committees,<sup>6,7,19</sup> the EP can allow for inclusion of nontraditional metrics of impact (e.g., downloads, page views, international reach). For blogs and podcasts, educators should include metrics, such as the digital impact factor.<sup>20</sup> When presenting educational materials online (e.g., webinars, blog posts), you can account for the total number of viewers, downloads, and even the geographic distribution (thereby speaking to international recognition).

### Describe mentorship activities

Serving as a mentor has distinct benefits for the mentor and the organization.<sup>21,22</sup> Mentors in medical education serve to support their mentees' career development by providing advice and guidance as part of an interactive and bidirectional relationship. These mentorship activities, whether as part of a longitudinal relationship or as a short-term role as part of a project or event, can be a powerful addition to the EP and can highlight the impact on

the future of the field as you develop others' careers and act in a senior role in academic scholarship or as a developmental career mentor/sponsor. It is important to capture mentees' successes in *your* EP, including *their* academic advancement (e.g., leadership positions, publications, grants). You should reflect the mentee's achievements that were a product of your mentorship relationship, even if the relationship is no longer active. Simply providing information to another individual does not typically meet the bar of true mentorship. The continuum of mentorship to sponsorship (which often implies an even more active role in career development) is represented here as "mentorship." Using an online EP, you could also link to a mentee's work and even use network analyses to demonstrate the downstream impact of your collaboration on their future work.

### **Incorporate self-assessment and the assessment from others**

The assessment portion should be divided into two sections. The first details a self-assessment that reflects on strengths and areas for growth. This self-assessment should not only include introspection on one's activities and achievements but also incorporate external feedback. A framework such as the clinician educator milestones can guide the self-assessment.<sup>4</sup> This section should also include a full 360° assessment from others who have observed you in an educator role including learners, colleagues, mentors, patients, and nurses. These assessments may come from courses taught, bedside teaching assessments, structured faculty assessments (e.g., OSTE), and clinical work. An online platform such as Google Forms (<https://docs.google.com/forms>), Qualtrics ([www.qualtrics.com](http://www.qualtrics.com)), or REDCap ([www.project-redcap.org](http://www.project-redcap.org)) can facilitate anonymous evaluations and synthesize 360° evaluations of faculty if these are not readily available as part of the usual assessment process. Moreover, you could share your educational materials and didactics online and solicit feedback from a broader range of end-users than those only at a single institution.

### **Report comprehensive accounting of presentations**

An EP can significantly expand on traditional components of a CV, which often only includes details like date, session length, location, and title. Relevant information can include number of participants in attendance and level of learner, other speakers or panelists, and type of presentation (e.g., plenary session, research presentation, didactic, panel, small group, workshop). Moreover, the EP should include data from evaluations, including both quantitative (e.g., summative and individual quality scores) and qualitative (e.g., learner comments and feedback) components. Finally, it is important for the rigor of the EP to include a description of the ways the science and theory of learning was incorporated into the preparation and delivery of the presentation. Depending on the format of the EP, clinician educators

can include links to presentation materials (e.g., slides, handouts) or embed videos.

### **Describe leadership activities**

Leadership activities span multiple levels and range from local initiatives to national roles. Serving as a leader demonstrates initiative and portends future success. When describing leadership roles, it is important to include the nature of your appointment (e.g., election or search committee), purpose of the activity, the number of people on the team, and the sponsoring organization. If there are measurable outcomes resulting from leadership efforts, it is reasonable to include evidence of these. Leadership roles are often associated with formal titles; however, consider including additional informal leadership activities as well. This could include leading a project or programmatic change for your department or serving as point person for a group of learners (e.g., intern class assistant program director). The EP also allows further description of a specific role, such as the efforts as last author on a paper with a junior faculty first author or the novel initiatives created while serving in a formal leadership role.

### **Utilize technology to facilitate dissemination and sharing of your EP**

The EP has traditionally been a paper-based collection of documents, similar to the CV. Although your institution may require a templated hard copy EP, modern advances in the dissemination of and access to information provide opportunities to improve on this model. Given that an institutional EP will often only be utilized during promotion cycles, clinician educators should consider a format or platform that fosters dissemination to a broad virtual audience and is easily accessible for real-time updates and reflection. One option is to use existing personal or professional webpages to host an EP as a collection of static documents, allowing easy access for anyone interested in learning more or considering future collaborations. There are also websites dedicated to electronic portfolio creation and management. Two examples that the authors have personal experience using are Foliotek ([www.foliotek.com](http://www.foliotek.com)) and Mahara ([www.mahara.org](http://www.mahara.org)). Additionally, clinician educators can create dynamic pages, such as a hierarchical table of contents that hyperlinks to relevant sections or even direct links to products and embedded video examples. Social media dissemination can be coordinated to ensure consistency across platforms and help drive traffic via different platforms (e.g., Twitter, LinkedIn, Instagram, TikTok, personal webpage).

## **CONCLUSION**

The educator of the 21st century should maintain an updated educator's portfolio and utilize technology to enhance, maintain, and disseminate an updated educator's portfolio. A complete educator's

portfolio includes content in six core categories: educator's philosophy, scholarly products, mentoring activities, assessments, presentations, and leadership. A well-thought-out educator's portfolio facilitates personal growth and reflection, can be used to build a virtual communities of practice, and is a useful tool to support promotion and tenure.

### AUTHOR CONTRIBUTIONS

All authors were responsible for the study concept and design, drafting of the manuscript, critical revision of the manuscript, acquisition of the data, analysis and interpretation of the data, and statistical expertise.

### ACKNOWLEDGEMENTS

The authors acknowledge Gloria Kuhn, DO, PhD, for introducing us to the importance of the educator's portfolio within academic medicine.

### CONFLICT OF INTEREST STATEMENT

The authors declare no conflicts of interest.

### ORCID

Sara M. Krzyzaniak  <https://orcid.org/0000-0002-8173-2750>

Wendy C. Coates  <https://orcid.org/0000-0002-3305-8802>

Michael Gottlieb  <https://orcid.org/0000-0003-3276-8375>

### REFERENCES

- Gottlieb M, Promes SB, Coates WC. A guide to creating a high-quality curriculum vitae. *AEM Educ Train*. 2021;5(4):e10717.
- Yarris LM, Chan TM, Gottlieb M, Juve AM. Finding your people in the digital age: virtual communities of practice to promote education scholarship. *J Grad Med Educ*. 2019;11(1):1-5.
- Gottlieb M, Chung A, Battaglioli N, Sebok-Syer SS, Kalantari A. Impostor syndrome among physicians and physicians in training: a scoping review. *Med Educ*. 2020;54(2):116-124.
- Clinician Educator Milestones. Accreditation Council for Graduate Medical Education. Accessed August 27, 2023. <https://www.acgme.org/milestones/resources/clinician-educator-milestones/>
- Gottlieb M, Chan TM, Yarris LM, Linden JA, Coates WC. Promotion and tenure letters: a guide for faculty. *AEM Educ Train*. 2022;6(3):e10759.
- Husain A, Repanshek Z, Singh M, et al. Consensus guidelines for digital scholarship in academic promotion. *West J Emerg Med*. 2020;21(4):883-891.
- Maldonado G, Smart J, Wiechmann W, et al. Frequency of social media and digital scholarship keywords in U.S. medical schools' promotion and tenure guidelines. *Acad Med*. 2022;97(1):105-110.
- Hong DZ, Lim AJS, Tan R, et al. A systematic scoping review on portfolios of medical educators. *J Med Educ Curric Dev*. 2021;8:23821205211000356.
- Mayersak RJ, Yarris LM, Tuttle RC, et al. Demonstrating your work: a guide to educators' portfolios for graduate medical educators. *J Grad Med Educ*. 2021;13(5):635-639.
- Dalton CL, Wilson A, Agius S. Twelve tips on how to compile a medical educator's portfolio. *Med Teach*. 2018;40(2):140-145.
- Landry A, Coates WC, Gottlieb M. Creating a high-quality personal statement for residency application: a guide for medical students and mentors. *AEM Educ Train*. 2022;6(5):e10797.
- Stallworth WL. The mission statement: a corporate reporting tool with a past, present, and future. *J Bus Commun*. 2008;45(2):94-119.
- Mussack B. Social justice and corporate mission statements: analyzing values in business writing. *Prompt J Acad Writ Assign*. 2021;5(1):15-22.
- Boyer EL. *Scholarship Reconsidered: priorities of the Professoriate*. Carnegie Foundation for the Advancement of Teaching; 1990.
- Glassick CE. Boyer's expanded definitions of scholarship, the standards for assessing scholarship, and the elusiveness of the scholarship of teaching. *Acad Med*. 2000;75(9):877-880.
- Glassick CE, Huber MT, Maeroff GI. *Scholarship Assessed: Evaluation of the Professoriate*. Jossey-Bass; 1997.
- Simpson D, Fincher RME, Hafler JP, et al. Advancing educators and education by defining the components and evidence associated with educational scholarship. *Med Educ*. 2007;41(10):1002-1009.
- Shinkai K, Chen CA, Schwartz BS, Loeser H, Ashe C, Irby DM. Rethinking the educator portfolio: an innovative criteria-based model. *Acad Med*. 2018;93(7):1024-1028.
- Cabrera D, Vartabedian BS, Spinner RJ, Jordan BL, Aase LA, Timimi FK. More than likes and tweets: creating social media portfolios for academic promotion and tenure. *J Grad Med Educ*. 2017;9(4):421-425.
- Lin M, Phipps M, Chan TM, et al. Digital impact factor: a quality index for educational blogs and podcasts in emergency medicine and critical care. *Ann Emerg Med*. 2023;82(1):55-65.
- Farrell SE, Digioia NM, Broderick KB, Coates WC. Mentoring for clinician-educators. *Acad Emerg Med*. 2004;11(12):1346-1350.
- Coates WC. Being a mentor: what's in it for me? *Acad Emerg Med*. 2012;19(1):92-97.

**How to cite this article:** Krzyzaniak SM, Coates WC, Gottlieb M. A guide to creating an educator's portfolio for the 21st century. *AEM Educ Train*. 2024;8:e10931. doi:[10.1002/aet2.10931](https://doi.org/10.1002/aet2.10931)