

Sample Portfolio: names, publications, etc. are fictional and designed to represent one type of portfolio that an Academy applicant could submit. Each sample portfolio is designed to meet the "standard" for admission into the Academy.

CLINICAL EDUCATOR PORTFOLIO

Name and Degree(s): **JOHN DOE**
Position: **PROFESSOR**
School **SCHOOL OF HEALTH PROFESSIONS**
Department/Program: **DEPARTMENT OF PHYSICIAN ASSISTANT STUDIES**
Percent Effort in Educational Activities: **100%**

SECTION I: TEACHING, ASSESSMENT, MENTORING, ADVISING

1. Describe the philosophy that guides your practice as a teacher, assessor of learners, mentor and/or advisor.

A common thread is woven through my role as a teacher, mentor, facilitator and advisor. The thread is to assist the learner to become a self-directed learner. In this I have been strongly influenced by Malcolm Knowles' theories of adult learning and self-directed learning. Knowles led me to the work of Philip Candy, particularly his definitive book, *Self-Direction for Lifelong Learning: A Comprehensive Guide to Theory and Practice*, 1991. I apply his three ways to increase a learner's self-directedness: Develop broad self-management competencies, stimulate deep familiarity with the subject matter, and facilitate a sense of learning competence.

2. Describe how you have prepared yourself for your role as a teacher, assessor, mentor and/or advisor.

My doctoral program in educational psychology (1992-1995) is the keystone of my preparation as a faculty member. My dissertation advisor, Robert Hernandez, mentored me in the application of Candy's model. My dissertation, *A Diagnostic Instrument for Assessment of the Developmental Stage of Adult Learners in the Health Professions*, has been extensively cited in the educational literature, and has been the foundation for my teaching and educational research program at UTMB.

Since I joined the UTMB PA faculty I have continued to hone my skills as teacher. Here are selected workshops and activities since 2002:

Advanced Training in Facilitation of Problem-Based Learning. UTMB Office of Educational Development, Feb. 4, 2002.

Promoting Interdisciplinary Collaboration. Workshop at Texas Society of Allied Health Professions. Oct. 20, 2002.

Online Teaching Skills Workshop. Pre-conference workshop, Physician Assistant Education Association, Nov. 12, 2002.

Fostering Collaboration among Distance Students. Pre-conference workshop, Texas Distance Learning Association, March 29, 2003.

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Teaching Evidence-Based Medicine to Physician Assistant Students. University of Utah Health Science Center workshop, Feb. 4-6, 2004.
Faculty Training in Blackboard Course Management System. UT TeleCampus, October 22-24, 2005
Online Certification in Distance, Online and Blended Learning Technologies. University of Georgia Division of Continuing Education. June – December 2006.

3. Teaching/Assessment Activities

For Teaching and Assessment activities, duplicate and complete this table for each separate activity you wish to present. In the Appendix, provide examples of work that support the scope, quality and dissemination of the activity, if available.

Activity	Primary Instructor: PHAS 5555: Professional Issues I
Context of activity (school or department, format of activity)	PA departmental course: lecture and discussion.
Description of role	Primary Instructor
Duration of service (give years)	2001 – present (Summer semester)
Service quantity (e.g., hours/year)	2 credit course (30 contact hours + 60 preparation hours)
Number and type of learners (e.g., number per year, semester, term)	60 first-year PA students per semester
Goals for the activity	The course covers history of the profession, legal and ethical issues, and current “hot topics” in the PA profession. Provide a historical, legal and ethical foundation of the students as they develop into professionals.
Description of degree to which goals were accomplished	The overall conclusion is that through examination and group and individual assignments, the students achieved the goals.
Outcomes, accomplishments and other Indicators of quality of service or impact in this role	Student instructor evaluation (standard SAHS evaluation instrument): Since 2001, aggregate evaluation has been 3.69 (4-point scale; total of 311 student evaluations). The overall SAHS instructor evaluation is 3.12 ± .46 (mean ± SD)
Dissemination (e.g., engagement with the community of educators)	Presentation: Using case studies in teaching professional issues. Physician Assistant Education Association (PAEA) Annual Meeting, November 2003. Publication: Case Studies in Professional Issues for Physician Assistant Students. <i>Journal of Education of Midlevel Practitioners</i> , 2004.

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Activity	Primary Instructor: PHAS 5678: Health Promotion & Disease Prevention
Context of activity (school or department, format of activity)	PA departmental course: lecture, discussion, Problem-based Learning (PBL) group course.
Description of role	Co-Primary Instructor (50% responsibility); PBL facilitator
Duration of service (give years)	1997 - present
Service quantity (e.g., hours/year)	3 credit course (45 contact hours + 90 preparation hours)
Number and type of learners (e.g., number per year, semester, term)	48 first-year PA students per term (Fall term).
Goals for the activity	The students gain an appreciation of the application of basic epidemiological principles in clinical practice; theories and methods of health promotion and disease prevention; skills in patient counseling and education in changing health behaviors.
Description of degree to which goals were accomplished	The overall conclusion is that through examination and group and individual assignments, the students achieved the goals.
Outcomes, accomplishments and other Indicators of quality of service or impact in this role	Student instructor evaluation (standard SAHS evaluation instrument): Since 1997, aggregate evaluation has been 3.45 (4-point scale; total of 408 student evaluations). The overall SAHS instructor evaluation is 3.12 ± .46 (mean ± SD) Physician Assistant Teaching Excellence Award, 1999, 2003, 2006. SAHS Teaching Excellence Award, 2005. Both of these awards are nominated by students and then selected by an Allied Health faculty peer committee
Dissemination (e.g., engagement with the community of educators)	Presentation: Doe JP. & Deer BD. Preventive Medicine for Physician Assistants: A Videoconference and Internet-Based Course. Texas Distance Learning Association, 2001 Publication: Doe JP. & Deer BD. Blending Online and Classroom Teaching in Health Promotion and Disease Prevention. <i>Journal of Education of Midlevel Practitioners</i> , 2005.

Activity	Primary Instructor: PHAS 5432: Evidence-Based Medicine
Context of activity (school or department, format of activity)	PA departmental course consisting of lectures, discussions, and PBL groups.
Description of role	Primary Instructor; PBL facilitator

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Duration of service (give years)	2005 - present
Service quantity (e.g., hours/year)	2 credit course (30 contact hours + 60 preparation hours)
Number and type of learners (e.g., number per year, semester, term)	48 students per term (Spring term).
Goals for the activity	PA students to gain skills in evidence-based medicine before beginning their clinical year.
Description of degree to which goals were accomplished	The overall conclusion is that through the standard SOM evaluation of PBL performance, the students achieved the goals.
Outcomes, accomplishments and other Indicators of quality of service or impact in this role	Student instructor evaluation (standard SAHS evaluation instrument): Since 2001, aggregate evaluation has been 3.69 (4-point scale; total of 311 student evaluations). The overall SAHS instructor evaluation is 3.12 ± .46 (mean ± SD)
Dissemination (e.g., engagement with the community of educators)	Presentation: Evidence-Based Medicine in Problem-Based Learning, PAEA Annual Meeting, 2006. Article Accepted for Publication: Integrating Evidence-Based Medicine into Clinical Medicine Problem-Based Learning Groups. <i>Journal of Education of Midlevel Practitioners</i> , in press.

Activity	Great Syndromes: Year 2 School of Medicine Course
Context of activity (school or department, format of activity)	Great Syndromes represents a culmination of years 1 and 2 of the medical school curriculum.
Description of role	PBL Group Facilitator
Duration of service (give years)	A group each year since 2000
Service quantity (e.g., hours/year)	32 contact hours per term (Spring term) plus preparation
Number and type of learners (e.g., number per year, semester, term)	8 per group for a total of 56 students (medical and PA students)
Goals for the activity	The PBL cases are designed to cross disciplines and organ systems. The course has a secondary goal of exposing the medical and PA students to their respective professional roles.
Description of degree to which goals were accomplished	The overall conclusion, based on the standard SOM PBL evaluation, is that the students achieved their goals.
Outcomes, accomplishments and other Indicators of quality of service or impact in this role	Since beginning in 2000, I have been invited each year to serve as a PBL facilitator. Student instructor evaluation (standard SOM evaluation instrument): Since 2000, aggregate evaluation has been 3.44 (4-

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	point scale; total of 56 student evaluations). The overall instructor evaluation is 3.33 ± .78 (mean ± SD)
Dissemination (e.g., engagement with the community of educators)	Presentation: A PA Faculty Member’s Experience in Facilitating a Problem-Based Learning Group of Medical and PA Students. PAEA Annual Meeting, 2004.

Activity	PHAS 6666: Clinical Rotation in Health Promotion in Occupational Medicine
Context of activity (school or department, format of activity)	PAS Clinical Rotation
Description of role	Director of Clinical Rotation
Duration of service (give years)	1997 - present
Service quantity (e.g., hours/year)	400 hours/year (direct contact plus preparation)
Number and type of learners (e.g., number per year, semester, term)	6 PA students per 6-week rotation for a total of 48 students over the entire clinical year
Goals for the activity	That students gain experience in interacting with patients in an occupational setting and that the students develop an appreciation of the issues faced by the patients.
Description of degree to which goals were accomplished	The overall conclusion is that through examination, assigned papers, and evaluations by preceptors, is that the students achieved the goals.
Outcomes, accomplishments and other Indicators of quality of service or impact in this role	<p>Student instructor evaluation (standard SAHS evaluation instrument): Since 2000, aggregate evaluation has been 3.73 (4-point scale; total of 297 student evaluations). The overall SAHS instructor evaluation is 3.12 ± .46 (mean ± SD)</p> <p>Since I began the rotation in 1997, the number of graduates who have gone into occupational medicine practices has increased from a mean of one per year to 3-4 per year. A comment from the graduate survey in 2000: “Professor Doe really opened my eyes about the opportunity in occupational medicine to apply my passion for health promotion.”</p> <p>Note: There is no occupational medicine section on the National Commission on Certification of PAs (NCCPA) national certifying exam.</p>
Dissemination (e.g., engagement with the community of educators)	Presentation: Building Service Learning into a Rotation for Health Promotion in Occupational Medicine. Presented at American Academy of Physician Assistants

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	conference, May 2004.
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4. For mentoring, and mentoring-related activities (e.g. student advising, chairing a dissertation committee), use the following documentation format, duplicating this table as many times as needed:

Name of mentee or advisee	Multiple Physician Assistant Students
Description of role as mentor/advisor	Advisor to group of 6 first-year and 6 second-year PA students each year.
Purpose or goals of relationship	<ul style="list-style-type: none"> • Provide a professional role model for the students. • Provide a mechanism for ongoing review of the student’s professional development. • To identify professional or academic problems early allowing for effective intervention
Description of mentoring/advising process	<p>As new students matriculate, they meet with their advisor to discuss the purposes of the advisement process and to review for signature the student professional development form.</p> <p>At weekly PA faculty meetings, any concerns with students are discussed. Advisors are expected to contact their advisees with identified concerns, discuss the concerns, refer to the Office of Student Affairs, if needed, and report back to the faculty.</p> <p>At the end of each semester, the advisor meets with each advisee to review the professional development evaluation and discuss any issues from either the advisor or advisee</p>
Current Status of Advisee	Of total of 84 advisees since 2002, two were dismissed for academic reasons, and three had to repeat courses or rotations
Outcome(s) of relationship	82 advisees graduated
Documentation	<p>Departmental Annual Faculty Agreement Letter includes listing of advisees.</p> <p>Students provide an annual evaluation of the advisement process. Since 2000 the aggregate mean evaluation was 3.86 (4-point scale; total of 80 student evaluations). The overall PAS advisement evaluation is 3.62 ± .23 (mean ± SD)</p>

Name of mentee or advisee	Multiple Physician Assistant Students
Description of role as mentor/advisor	Supervisor/mentor for Master’s research project
Purpose or goals of relationship	PA students conduct a group (2-4 students) project for their Master’s degree. The supervisor’s role is

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	essentially the same as that of a thesis supervisor, except that a group, not an individual, is being supervised.
Description of mentoring/advising process	Supervise group formation, proposal preparation, conduct of the research, final report, and presentation. Finally, to work with the students in preparing papers for presentation at professional meetings and for publication. Since we began the Master’s program in 2001, I have supervised 13 projects (40 students total).
Current status of advisee	Presently I supervise three projects (10 students total)
Outcome(s) of relationship	All mentored students completed their projects and graduated.
Documentation (dissemination of student projects)	<p>Publication:</p> <p>Alphonse AB et al. Knowledge and Attitudes of Physician Assistants in Specialty Practice towards Colorectal Screening. <i>J. Cancer Education</i>, 2004. (also presented at Texas Academy of PAs, 2003)</p> <p>Accepted for Publication:</p> <p>Betancourt CD et al. Patient Beliefs Concerning Antibiotic Use. <i>Patient Education Bulletin</i>, in press.</p> <p>Conover EF et al. Pinch Strength Norms for Elderly Individuals. <i>J. Hand Assessment</i>, in press.</p> <p>Presentations:</p> <p>DeLeon GH et al. Counseling Homeless Patients on Nutrition. <i>Texas Academy of PAs</i>, 2005.</p> <p>Harkonnen FR et al. Self-Directed Learning among Applicants to PA programs,. Physician Assistant Education Association (PAEA) Annual Meeting, 2004.</p> <p>Two manuscripts in preparation for publication.</p> <p>Two presentations in preparation state meetings.</p>

Use space below for descriptions of teaching accomplishments that either do not fit the other categories or fall outside the past 5 years but that are significant. At the end of each description, tab forward to insert new line.

SECTION II: ENDURING EDUCATIONAL MATERIALS

1. Describe the philosophy that guides your development of educational materials.

First and foremost, I seek out the best possible existing materials for use in my courses. The internet, educational list servers, publications and contacts made at professional

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meetings are my ways of finding these materials. In 1997 J.L Hogan and I began the “Educational Methods Journal Club” at UTMB in which techniques, theories and best practices in education are discussed. This group continues to meet monthly. In parallel to using an evidence-based approach in my clinical practice as a PA, I believe that our educational methods and materials should also be grounded in evidence.

I believe I have been disciplined and systematic enough not to rush into developing materials, but to find what has already been developed and adapting it to my needs.

2. Describe how you have prepared yourself for your role as a developer of educational materials.

A significant part of my doctoral program in educational psychology was devoted to curriculum in higher and professional education. The preparation provided the foundation for applying a systematic approach to developing and evaluating education materials.

Since then I have attended many workshops (listed elsewhere in this document) and extensively read the literature and applied the literature. The diagnostic instrument developed and validated in my dissertation (described earlier) is a crucial tool I use to develop my educational materials at appropriate developmental stages.

3. Provide information about each activity in the Enduring Materials category. Duplicate the table below, completing one table for each enduring material related to education. (Do not include publications not related to education (eg.a basic science research publication). List your materials in reverse chronological order, with the most recent ones at the beginning.

Educational material	Online Case Studies
Description of material	Online Case Studies in Evidence-Based Medicine for Physician Assistant, Nurse Practitioner, and Medical Students
Role in development	Principal Investigator & Chief Designer
Goals or purpose of educational material	Develop an online library of case studies to be used in teaching evidence-based medicine. A crucial innovation is establishment of a dynamic mechanism for ongoing evaluation and modification of the case studies. Thus far, 12 cases studies have been designed to be used as self-paced, self-instructional lessons. Our research has shown that students, depending upon their stage of development and training, can complete these cases in 4-8 hours. Development of these materials was supported by a grant from the Physician Assistant Educational Foundation.

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	A new grant proposal is in preparation to produce animated Adobe Flash videos of computer-generated patient interactions using the University of Kansas Virtual Reality Avatar Software. The videos will be incorporated into the existing cases and future cases. The proposal will be submitted to the Arthur C. Clarke Foundation for Future Technology in Education.
Outcomes, accomplishments and other Indicators of quality of service or impact in this role	The cases studies were recognized as “Making a significant contribution to rigorous and systematic teaching of evidence-based medicine for health professions students” by the Foundation for the Advancement of Higher Education in Texas, 2006.
Dissemination (e.g., engagement with the community of educators)	The library of 12 cases is published in the peer-reviewed web site, MERLOT: Multimedia Educational Resource for Learning and Online Teaching, 2006. Usage statistics will be available in 2007.

SECTION III: EDUCATIONAL LEADERSHIP

1. Describe the philosophy that guides your educational leadership activities.

In my graduate program we studied Zaleznik’s (1977) work on the differences between managers and leaders. More recently Paul Ramsden (1998) put forward principles of leadership in higher education which combines elements of both management and leadership. The characteristics of both managers and leaders which I attempt to put into practice are 1) help others achieve results contributing to overall success of the organization (department, school, university, profession); 2) be willing to take risks; 3) seek out fresh approaches to long-standing problems; and 4) create a climate in which teachers and learners are open to change.

2. Describe how you have prepared yourself for your educational leadership roles.

When I entered physician assistant education in 1995, I instituted my plan for development as an educator, including leadership in professional education.

As I stated Section I, I earned my Ph.D. in Educational Psychology in 1995. Although I was given a solid foundation in educational theory and practice, including management in higher education, my program did not delve deeply into technology. In 2000 I assumed the departmental position of Vice Chair for Education (see below). Part of a Vice Chair’s responsibilities are to lead and mentor the faculty in the use of educational technology. I attended courses on WebCT and Blackboard, both at UTMB, in Austin through the UT TeleCampus, and at preconference workshops of the Texas Distance Learning Association. In 2006 I took six-month online certification course in Distance, Online and Blended Learning Technologies through the University of Georgia.

Before assuming leadership positions in the professional organizations listed below, I actively participated as a member.

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In 1999 I applied to be a site visitor for the Accreditation Review Committee for Physician Assistants (see below). I was accepted and underwent two days of training in 2000 before being assigned my first program site visit.

3. Provide information about each activity in the Educational Leadership category Duplicate the table below, completing one table for each leadership activity. List your materials in reverse chronological order, with the most recent ones at the beginning.

Activity	Department of Physician Assistant Studies
Description of leadership role	Vice Chair for Education
Duration of service (give years)	2000 – present
Goals and/or initiatives	1) Supervisor of the first-year (preclinical) curriculum. Responsibilities include quality assurance, that courses syllabi meet SAHS, UTMB and accreditation requirements. 2) Administrator and chief designer of departmental WebCT courses
Outcomes, accomplishments and other Indicators of quality of service or impact in this role	In 2001 we entered the first Master’s class (prior to that we were at the baccalaureate level). In 2005 we implemented a revision of the course sequence and made substantive changes in some courses. Effective 2005 every course in the curriculum, didactic and clinical, has a WebCT site.
Dissemination (e.g., engagement with the community of educators)	Beginning in 2000 I have served as the PAS representative on the SAHS Curriculum Committee

Activity	Research Review Committee Physician Assistant Education Association
Description of leadership role	Chair (2003 – present) Member (2000-2003)
Duration of service (give years)	2000 - present
Goals and/or initiatives	The charge of the committee is to review all surveys and other research projects involving member programs of the Physician Assistant Education Association.
Outcomes, accomplishments and other Indicators of quality of service or impact in this role s)	Since I joined the committee we have reviewed approximately 100 research proposals. Feedback from program directors is that they value the role of the committee in assuring the quality of research projects involving their programs. Principal investigators value the critiques which improve their

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	research.
Dissemination (e.g., engagement with the community of educators)	The Committee maintains of list of all approved projects on the PAEA website. The Committee holds a public forum at each PAEA annual meeting to inform and receive feedback on the Committee’s activities from PA educators.

Activity	Accreditation Site Visitor, Accreditation Review Committee for Physician Assistants (ARC-PA)
Description of leadership role	Served as member (three-person team) and as Chair of site-visit team
Duration of service (give years)	2000 - present
Goals and/or initiatives	To evaluate new PA programs for accreditation and to conduct periodic evaluations of accredited programs (on a cycle between 3 – 7 years).
Outcomes, products, and/or accomplishments	I have served on 6 site visit teams and chaired two of them.
Dissemination (e.g., engagement with the community of educators)	I have participated in a “tips for programs facing accreditation visits” on a panel at the annual meeting of the PAEA, 2004.

Activity	President of the Texas Association for Health Professions Education
Description of leadership role	Lead the association, a state-wide forum for all health professions and educational programs in Texas
Duration of service (give years)	2002 - 2004
Goals and/or initiatives	My chief goals were: <ul style="list-style-type: none"> • Working with the Vice President, who serves as the annual program Chair, to attract more attendees at the annual conference by improving the type and quality of the sessions. • Rebuild relationships with community college-based allied health programs, thereby increasing attendance at the annual meeting.
Outcomes, accomplishments and other Indicators of quality of service or impact in this role	The 2005 Annual Meeting, which was planned during my tenure as President, had the highest attendance (more than 100) than any other meeting since 1997. Fully one-third of the participants were affiliated with community colleges. In 2005 I received the Association’s Outstanding Service Award.
Dissemination (e.g., engagement with the community of educators)	As President I wrote a column for each Quarterly Newsletter (which as been online since 2002) and presided over the annual business meeting at each annual meeting.

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For more information about creating an Educator Portfolio, see a presentation at
<http://emedia.utmb.edu/educatorportfolio>.

This Educator Portfolio is used by the UTMB Academy of Master Teachers, adapted from Simpson D, Fincher RM, Hafler JP, Irby DM, Richards BF, Rosenfeld GC, Viggiano TR. Advancing educators and education by defining the components and evidence associated with educational scholarship. *Med Educ*. 2007 Oct; 41(10):1002-9. Epub Sep 5, 2007.

See also: Simpson, D, Marcdante, K, Fenzel, J, (2007). The Educator's Portfolio & Curriculum Vitae - Workshop & Resource Guide. MedEdPORTAL:

<http://services.aamc.org/30/mededportal/servlet/s/segment/mededportal/?subid=677>