Guide to producing an Education Dossier and using the Annual Report Form

Preamble

An electronic Education dossier is produced automatically from data inputted to the Annual report online (ARO). A Word-file can be generated at any time simply by going to reporting on the ARO’s home page tool bar, choosing "Education Dossier" and then choosing "generate".

The ARO collects data for every section of the education dossier except commentary from student feedback. This means that all entries will be permanently stored on the ARO server for future reference and use. If you have text material from last year’s education dossier that you wish to re-enter into the ARO, you can simply cut and paste it into the ARO and it in turn will be incorporated into the education dossier.

Since the ARO has only collected the data that is imported into this document since 2009, data from prior years must be manually entered in the tables provided in dossier. With each year of use of the new ARO, there will less need for manual entry. As a general rule teaching data (see section 2a) from the previous 5 years is the most pertinent. This can save a lot of manual data entry work for faculty members who have been teaching for many years!

You can revise your education dossier at anytime by revising the sections in the ARO. However, please note that any revisions and edits that you make to the word document itself after it is outputted by the ARO must be saved by you, as these changes will not occur in the ARO forms, and therefore will not be saved elsewhere. So please keep your revised copy in a safe place! When you finally submit your ARO you can include the revised Education dossier as a word file. See the end of this guide for details.

Sections

1. Teaching and educational philosophy

This 500 words or less free text entry section is automatically exported from the ARO section of the same name. It allows you to briefly outline your education and teaching philosophy, and your views about learners, learning, your teaching, and your educational contributions. It is intended to promote self-reflection, and scholarship in teaching and other educational contributions. Over time, your philosophy should become more informed by best evidence in medical education theory and practice, and be more explicitly and comprehensively applied throughout your activities and contributions.

Your reflection on the consistency amongst your teaching philosophy, goals, objectives, teaching strategies and ways to evaluate students may be entered in Section 3.
2. Participation, contribution and leadership in teaching and education

"My job description involves (imported from AROL) % of my time to be devoted to educational activities. (This percentage is auto-filled from the ARO)"

A. Teaching, Supervising, and Mentoring

Classroom based teaching

Workplace-based teaching

Entries for these 2 sections will include type of teaching; start date/end date, learner’s Special circumstances, total half days spent, learner evaluation scores, and peer-observation.

Undergraduate, Graduate, and Post-graduate student supervision

Entries into this section of Work-placed based supervision include your role, name of Trainee, name/program, start-end dates, degree to be received, and special circumstances. Please note that if the student has graduated, their details (including degree received and "where are they now") will be listed under Section 2B: objective indicators of student progress.

Teaching outside of FOMD learners

This section includes giving CPL (Continuous professional learning) presentations, or teaching sessions in another institution.

Your formative assessment and feedback activities

This refers to the assessment and feedback you have provided during your teaching and supervision activities. Formative assessment is the gathering of information about student learning during the progression of a course or program and the provision of feedback so that the learner can modify their learning approach. An example would be reading the first lab reports of a class to assess whether some or all students in the group need a lesson on how to make them succinct and informative. An approach to reporting your activities is provided in the ARO help section (and Quick link) sections on formative assessment.

Mentoring and role modeling

Mentoring refers to the deliberate use of various types of behavior during an evolving goal-directed interpersonal relationship with a mentee. This is accomplished by planned meetings, encounters, or correspondence over an extended period of time that usually spans many months. Elements of mentoring (such as providing empathy, advice, challenges and motivation) may occur when teaching, supervising, assessing and evaluating learners and students during rotations, or courses. However, these relationships are usually too short or unstructured to fit the above definition. This section includes type of mentoring (formal or informal), mentees' names and status, start and end dates, and time spent.
Continuous professional development for your own development as a teacher

This pertains to continuous professional learning provided to you by others, rather than what you have given to others (CPL that you have given to others will be recorded under presentations in section 2D (educational dissemination beyond FOMD teaching or Faculty development for others). You should only list workshops that are specifically for your teaching. For example attendance at a CME workshop on new advances in the management of "X", should not be listed, but a workshop on improving the education of medical residents, should be listed. Entries will include date, type, scope, and descriptions.

This section also includes educational degrees or certificates that you have received.

B. Documentation of Results of Teaching

Results (statistics) of student evaluation (see section 2A)

Commentary from student feedback

This can be helpful, but it is important that you include all the comments, not just the favorable ones, together with a note that all comments have been included. Unless this note is added, people may assume that you have selected the most supportive comments. If lengthy these comments can be put into an appendix section. If you have not kept copies of student evaluations, then the Chair, course director or general office may be able to help.

As or more important are your responses to such narrative feedback provided by learners, and how this is linked to changes or consolidation in your teaching and educational contributions. This can be entered into section 3 (Systematic self assessment, evaluation and revision of your own teaching).

Objective indicators of student progress (graduate)

This section includes the success achieved by your selected trainees, graduate students, postdoctoral fellows, residents etc. This is a chance to report about the successes of those who have trained with you. This section captures their name, year their degree was received, their current position and institution.

This section also captures details of any publications by your trainee if they are first author on any co-authored publications with you. Just as the case in the publication section entries should include type of publication, whether or not it was peer reviewed, title, journal name, publication date, and volume issue and page range.

Peer-observed sessions and commentary

If you have entered data on being observed by a peer into any of the teaching sections of the ARO, it will be automatically be included here.

The intent of peer-observation and evaluation by peer activities is to provide formative feedback to the teacher. This is in itself very useful to the teacher committed to ongoing consolidation and improvement of their teaching, but has added value to both participants, through exchange of teaching ideas, collaborative approaches to teaching challenges, and the building of collegiality and community
among teachers. If you are interested in taking part in peer-observed session as a user or provider, please contact DSME at 780.492.6776 for details.

Awards and Recognition

Entries will include type, Scope of recognition, who the award was conferred by, and a description including terms of reference of the award. List only awards specifically for teaching, education, or role modeling or mentoring related to education. An award given for a paper on educational research would be included, but one for research in your scientific or medical discipline would not be listed here but in your curriculum vitae.

C. Teaching Scholarship

Teaching methods and strategies development: Integration and application of existing objectives, curriculum and methodologies into your own teaching

This section applies to any activities or commitments directed to the development or integration or revision of teaching methods and strategies for the Faculty, including changes you have made in your teaching and supervisory activities in response to feedback and self-reflection. Please note that the continuous professional learning to develop your own teaching methods and strategies, accomplished thorough workshops and instruction given by others, is an integral part of good teaching methodology and may be addressed in the continuous professional learning section of this report.

Entries into this section will include:

- Major methodologies, strategies, objectives, or curriculum integrated or applied
- Type of teaching or supervisory activity addressed (classroom based lecture series, classroom based small group session series, Gilbert’s scholars, workplace based clinical clerkship etc)
- Domain: (UME, PME, MCC etc)
- Response to feedback or self-reflection or peer-review by others

Peer-observation and feedback of other peers’ teaching activities

Any activities in which you have formally observed the teaching of another peer and given formative feedback to them will be recorded here. Entries will include the names of those you observed, as well as the venue in which the teaching and observation occurred (bedside/large classroom, etc.), and the date the observation was done. If you are interested in learning more or taking part in peer-observed sessions as a user or provider, please contact DSME at 780.492.6776 for details.
D. Educational scholarship

Development of course objectives and curriculum

This section applies to any activities or commitments directed to the development or integration of objectives in the curricular development of teaching series, blocks, or courses. Note that the development of individual lecture or session educational objectives is part of good teaching methodology and may be addressed in the teaching methods and strategies development section of this report. You might use the following elements as a guide when entering your descriptions:

- Methodologies used
- Type of activity or contribution such as classroom based lecture or small group session series, Gilbert’s Scholars, or Work-place based clinical clerkship
- Domain (UME, PGME, MCC etc)
- Your role (Developer, Integrator, Reviewer, etc)
- Date created/released/integrated

Summative assessment contributions

Entries into this section include type of summative assessment, the domain involved, your role, and start/end date

Summative assessment is the gathering of information at the conclusion of a course, program or undergraduate career to improve learning or to meet accountability demands. Summative assessment can also encompass review of courses and programs, admission interviewing and remediation. Activities such the analysis of student final examination performance in a course, to see if certain specific areas of the curriculum were less well understood than others, or being an OSCE examiner, an external examiner either for MSc/PhD students from this or other Universities, or as part of a licensing or progress examination, or being an external reviewer for a program would all be reported here.

Educational Products and processes

Entries will include type, domain, your role, scope of dissemination, release date/Update date, and details of peer review. Enter here any products of scholarship of discovery, integration or application that have not already been entered in the publication section. A product may be a document, computer program, audio-visual resource, examination tool, innovation or invention. Products become important and scholarly work when the following are present:

- The product is objective based in that it addresses an important need or task or process in teaching, assessment, self-direct learning, faculty development or research
- The methodology used to make the product is of appropriate and high quality
- The product is disseminated for the sharing and use by others, the method of dissemination involves routes other than standard publication in journals and books; the nature and scope of dissemination may include engagement, uptake and use with departmental, faculty, regional, national or international organizations.
- Whenever possible, the product is peer reviewed.
These products or processes should be prepared or developed specifically for education or teaching. If you hand out a review you wrote for a medical journal to those taking a course from you (and it may be an entirely appropriate handout) it should not be listed, but if you prepare material specifically to help students in that course, then it should be listed.

When recording your products (especially innovations) include a brief narrative account of the impact of its dissemination and use. If possible provide data that bear on whether the innovation was a success or not. This makes the significance of the product more apparent. Conversely, trivial changes listed in this section will detract from, rather than enhance the impression left with the reader!

**Educational Research and Review**

1. **Educational research** which includes any research you are doing in CIHR theme 3 (health sciences [education]). Entries may include funded and unfunded research grants Internal or external teaching development Grants, and Fellowships,

2. **Educational Peer reviewer activities** which includes any peer-review activities you have done for the educational or teaching activities or productivities of others, and is imported from the same named section in the ARO. Examples include peer-reviewing for a medical education journal, or peer reviewing of teaching by observing and giving feedback.

**Educational Publications**

When you tag your publications imported from PubMed (using the ARO's automated system) with the health services (education) research theme, it allows the education dossier to display only your publications that are pertinent to education.

**Educational Dissemination beyond FOMD teaching**

This section includes entries under two categories:

- **Teaching presentations to attendees who are outside of the FOMD**
  - Undergraduate and postgraduate teaching or supervisory programs. This includes giving CPL (Continuous professional learning) presentations, or teaching sessions in another institution.

- **Presentations for scholarly, scientific, administrative or service related purposes.** This includes domains of research, educational scholarship, administration, professional organizations, and various health initiatives, as listed in the domain drop down box. Presentations that address faculty development are listed separately in the next section.

**Faculty development for others**
If you have entered any presentations or product development into the ARO, and if you have selected "faculty development" from the domain (i.e. the purpose of the contribution), those entries will be listed here.

E. Educational leadership and Administration

Educational committee and service work

This section includes any educational contributions you have made as a member or participant of a committee, or as a consultant, advisor, or reviewer.

Administrative roles and accomplishments

This section includes any educational contributions you have made in an administrative role or a position of leadership. A full list is included in the "role" drop-down list of this section in the ARO but includes being vice-chair or chair of a committee, program director, block coordinator, principle teaching physician, or school educational lead, to name a few.

Exceptions to these entries in this section are committee or administrative activities that are related to summative evaluation (i.e. being a member or a chair of an oral examination board or thesis defense committee. Such activities and contributions will be listed in the summative evaluation activities section.

3. Self assessment, evaluation and plans

These two free text entry sections of the Annual report are automatically imported from the ARO sections of the same name. These entries allow you to briefly outline:

Systematic self assessment, evaluation and revision of your own teaching: Your successes in teaching contributions and activities, and what you feel could be improved or developed. List any plans for change or consolidation of your teaching contributions and performance, linked to your teaching outcomes and any feedback you have received.

Alignment goals and future plans: How well your educational contributions are aligned with your stated educational job description. Outline your short term (within the next year) and long term (within 2-5 years) goals related to further development of your skills, activities and contributions to education, and what will be required to accomplish this (including any support and potential changes in your job’s contribution profile).

Like the education and teaching philosophy section, it is intended to promote self-reflection, and scholarship in teaching and other educational contributions. Over time, your contributions should become more informed by best evidence in medical education theory and practice, and by your engagement in the scholarship of our educational community.

Acknowledgements
Appendix: Manually entering and Saving data in the Education Dossier

The Education dossier is a Microsoft word output of all data entered into the ARO that is pertinent to educational contributions. It can be used to help you create and submit an electronic or hard copy of your educational dossier.

It is important for you to note the following.

1. **For a number of sections, (for example teaching sections), the ARO "export" to the Education dossier will only contain data entered by you in 2009 or 2010.** Consequently if you wish to enter data from earlier years you will have to enter it manually into the tables of the Word document.

2. **Adding free text or new data to the tables in the Word document does not enter this data into the ARO.** So, if you generate an Education dossier again at a later date, although it would contain any new entries you had made into the ARO, it would not include any changes you had made on the previous generated Word document. Consequently you will need to save the Word document on your computer to save any additions you have made. **Practically it is best to complete your ARO before completing your Education dossier.** However If you want to simultaneously work on the free text sections of the report, or back fill tables with data before 2009, you can do the following:

1. Generate a copy of the Education dossier

2. Enter free text sections

3. Enter data into table sections. To use the same format, go to the table into which you wish to enter data and right-click your mouse with the cursor over the "report" year column. Choose "insert" then "insert rows" from the menu. A new formatted row will be produced for your use, either above or below the existing row, depending on your selection.

4. **Save all your changes in the Word file.** Once you have finalized entering data into your ARO, and then generate a new copy of the Education Dossier. You can then cut and paste the information from the old saved "working copy" to the new document-which will become the document you can submit.

How to cut and paste into tables:

Select (highlight with mouse) the material from the old file table to be copied. Right click on your mouse and select "copy". Go to the section (row) of the table that you wish to add the material. Create as new row as per instructions in #3. Right click with mouse cursor over the left end of the row and choose "paste cells".

5. Save an e-copy for next year to expedite data entry. With each year the "data legacy" of the ARO report will increase, reducing the amount of manual entry required.