

# **Creating Your Teaching Portfolio For Promotion**

Office of Faculty Affairs Career Development Session  
March 4, 2025

**Andrew Luks, MD**  
**Professor and Two-Time Portfolio Survivor**  
**Division of Pulmonary, Critical Care and Sleep Medicine**

# Disclosures

I have no financial disclosures or other conflicts of interest to report

I helped create the guidelines for the Teaching Portfolio that are most commonly cited in the School of Medicine

Having wrestled with many of the questions you likely have regarding the Teaching Portfolio, I feel your pain.

# Your Chair Calls With Good News...

What you hear

“We’d like to put you up for promotion”

Your initial reaction



**Your Initial Reaction Will Soon Change**



# Reality Sets In When Your Department Administrator Calls...

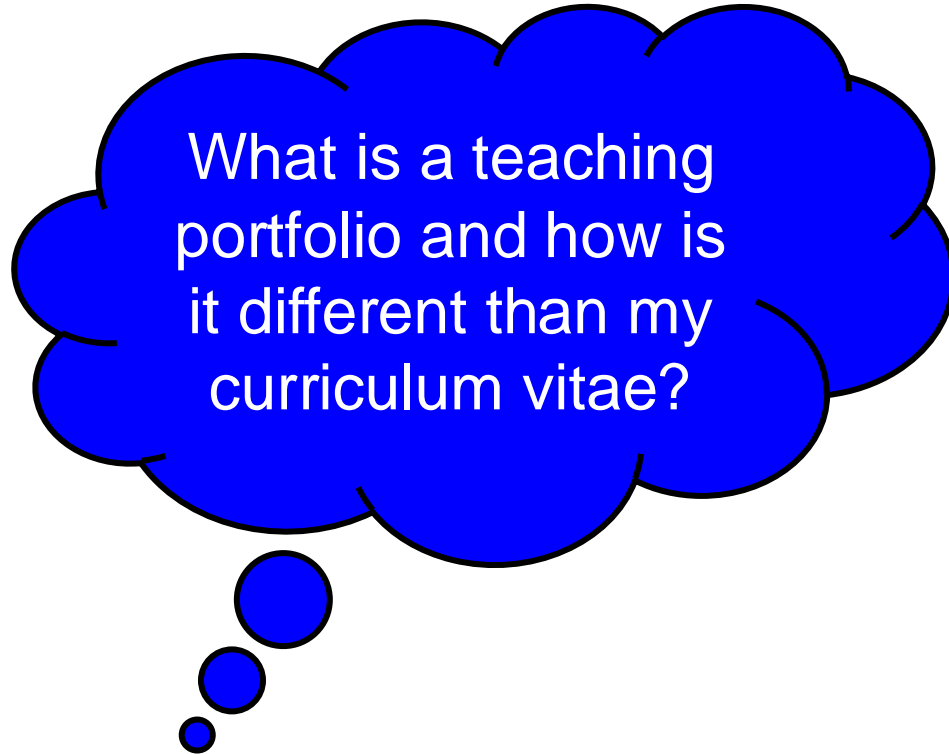
“Here’s what you need to get together for us in 6 weeks”



The Promotion Packet	
Curriculum vitae	
Peer evaluations	
Student and resident evaluations	
Teaching portfolio	
Self assessment	
Division head and service chief letters	
Internal and external letters	
Publication reprints (Top 5 Papers)	



# This Usually Elicits The Following Question



What is a teaching portfolio and how is it different than my curriculum vitae?

# The UW Curriculum Vitae Format

Personal Data	Professional Organizations
Education	Education & Training Activities
Post-graduate Training	Editorial Responsibilities
Faculty Positions Held	Special Responsibilities & Service
Hospital Positions Held	Clinical Activities
Honors and Awards	Research Funding
Board Certification	Bibliography
Current Licenses	Talks & Presentations
Diversity, Equity, Inclusion	Other Employment

**This is largely a list with little in the way of detail**

# An Example Of The Limited Utility Of CVs For Educators

CURRICULUM VITAE November 26, 2010

Name

MCG Titles      Vice Dean for Academic Affairs  
                         Professor of Medicine

Office Address      Academic Affairs, CJ-1036

Telephone  
Fax  
e-mail

PERSONAL

Home Address

Telephone

EDUCATION

Post-doctoral	Emory University Affiliated Hospitals, Atlanta, Georgia Residency, Internal Medicine	1977-1979
	Emory University Affiliated Hospitals, Atlanta, Georgia Internship, Internal Medicine	1976-1977
Graduate & Professional	Emory University School of Medicine, Atlanta, Georgia M.D.	1976
	Dartmouth Medical School, Hanover, New Hampshire B.M.S.	1974
College	Colby College, Waterville, Maine B.A. with Distinction in Biology	1972
High School	Wethersfield High School, Wethersfield, Connecticut Diploma	1968
Board Certification	American Board of Internal Medicine (Permanent certificate)	1983

PROFESSIONAL 1

Search for major dean role in  
**UW SOM**

## CV Attributes

33 pages long

Long list of teaching awards

No description of teaching roles

**The Question:** Is this person a  
good educator?

**The Answer:** I have no idea



# This Is Where The Teaching Portfolio Comes In

- A flexible document that allows you to educate people about what you do:
  - What you do as an educator
  - Why you teach the way you do
  - The *quantity* and *quality* of your teaching
- It is part of the promotions process but differs from the CV and is just one part of the promotions packet
- It is expected of people on clinical and research tracks

# Who Are You Educating?

The people who are  
evaluating your  
suitability  
for promotion



Division, Departmental and  
School of Medicine  
Appointments and  
Promotions Committees  
Outside Letter Writers

**Many faculty on A&P committees do not have a good  
sense of how to evaluate education-focused work**

# Our Agenda For This Session

To address  
common questions  
about the Teaching  
Portfolio

What information goes into the portfolio?

What should I emphasize in the portfolio?

Where do I get the information to  
populate the portfolio?

What is a teaching philosophy statement?

What does this all look like in the end?


# **A Big Caveat At The Start Of This Session**



**Expectations/guidelines for the portfolio are currently being revised**


**The effort is being led by CLIME under the auspices of the Office of Faculty Affairs**

# You Will Fall In One Of Two Groups Today



I'm up for promotion  
now and need a  
portfolio in just a  
few weeks

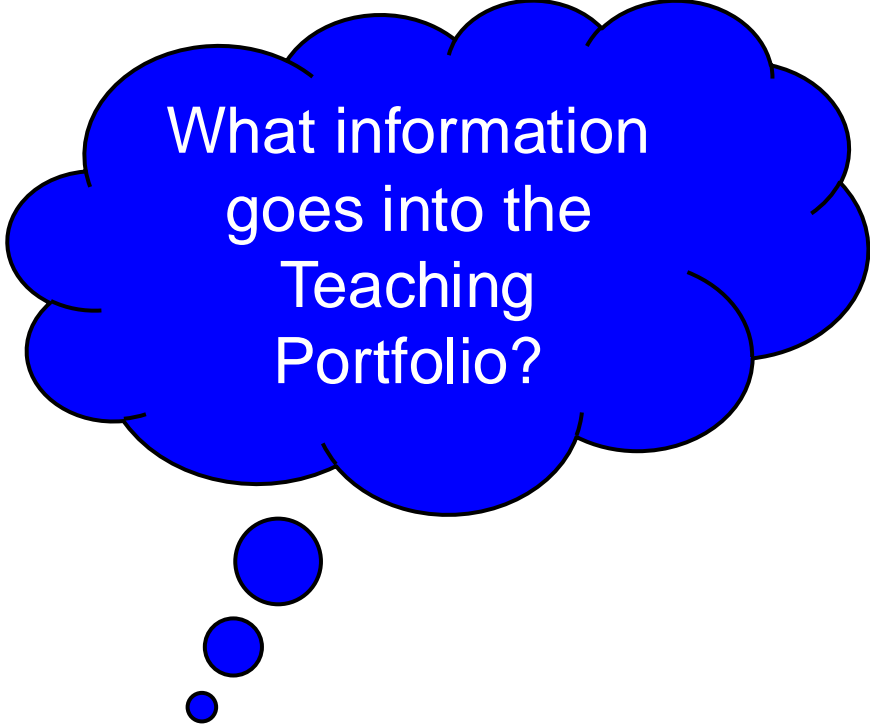
**Structure your portfolio  
as described in this session**



I'm not up for  
promotion for a  
while and am just  
planning ahead

**Focus on general points but  
do not create anything now  
using the portfolio structure  
described today**

# Question 1



What information  
goes into the  
Teaching  
Portfolio?

# For Many Years This Was The Standard



The portfolio of a now-retired Department of Medicine faculty member

This is *NOT* what your portfolio will or should look like!!!

# Sections To Include In A Teaching Portfolio

## The “Teaching Scholars Template”

Executive Summary	Mentoring
Personal Information	Educational administration
Teaching Philosophy	Long term goals
Teaching Activities	Honors and awards
Professional development	Recognition outside UW

**The format for physician- and research scientists is more streamlined**



# Expectations Vary By Department \*

## The Department of Medicine Expectations

### Required Components

Executive summary  
Personal information  
Teaching philosophy  
Teaching activities  
Professional development  
Regional/international recognition

### Optional Components

Mentoring  
Educational administration  
and leadership  
Honors and awards  
Long-term goals

Talk to your department administrator to clarify the expectations

\* Some do not even require a portfolio

# Expectations Also Vary By Track

## Clinician Scholar

“Full meal deal” portfolio including emphasis on scholarship, educational leadership, professional development

## Physician Scientist or Research Scientist

Pared down portfolio with focus on teaching activities, evaluations, mentoring

No focus on educational scholarship, education administration

In the anticipated new format, the expectations will be the same for all faculty with an approach that works for all tracks

# This Is A Flexible Document



**Build out areas in which you  
are strong**

**Deemphasize areas in which  
you have less of a role**

**Craft your evaluation story**

# The Portfolio Is Not Just A Repository Of All Feedback

Peer evaluation of teaching effectiveness

Date: February 24, 2011

Faculty member being observed:

Title of course/lecture/presentation: Less Invasive Hemodynamic Monitors in the ICU

	excellent	very good	good	fair	poor	nil
Content (accuracy/up to date?)	X	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Clarity and organization of presentation	X	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Usefulness of presentation content	X	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Use of instructional resource (powerpoint, video, etc.)	X	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Enthusiasm and stimulation of audience	X	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>
Overall teaching effectiveness	X	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>	<input type="radio"/>

Evaluator:  Faculty  Fellow  Housestaff  Staff

Comments: The talk was well structured and had information that everyone learned from. Andy's pacing was very good. I liked that he paused for questions repeatedly. I have possibly questions in addition not fully.

Please return form to: Joleen Sims at [jms@u.w.edu](mailto:jms@u.w.edu) or Box 355522

**You do not simply put all evaluations in a binder...**

**You *synthesize* the information into a concise, informative format**

# An Example Of How To Present Information About A Teaching Activity

**Direct Teaching Activities**

**Medical Student Education**  
I have the following roles in medical student education:

- **HuBio 541: The Respiratory System:**  
In addition to my current role as Co-Course Chair, I have two primary teaching responsibilities as part of this second year-medical student course on respiratory physiology and pathophysiology: I am a small group leader and also deliver a variety of lectures throughout the course.

**Small Group Leader:** Each year I serve as a small group leader during which I supervise and teach the students as they work through patient cases designed to increase their understanding of the course material. Numerical evaluations on a scale from 1(poor) to 5 (exceptional) for my performance as group leader are as follows:

Dimension	2007	2008	2009	2010
My Overall Effectiveness	4.9	4.6	5.0	5.0
Average Peer Scores	3.7	4.2	3.9	4.2

A sample of written comments for my work as group leader include the following:

2009: "At this point in my educational career, I've had a lot of teachers [redacted] ranks among the very top of those excellent educators. He did an AMAZING job of making something that can be quite confusing, very easy to grasp. His regard for the students' interest in the class, and willingness to put his time aside to teach was exceptional. [redacted] was great! He was always very happy to answer questions and help with whatever students were struggling with. I really appreciated his kindness and all the time he put into helping us learn the material. He is one of the best professors I have had in medical school so far!!"

Description of your teaching role

Summary of numerical ratings

Sample of written comments

# Another Example Of How To Present Information

## 3. Faculty Development

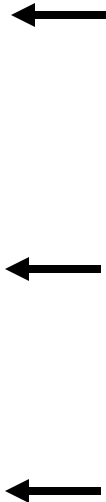
Faculty Development has become the focal point of my career, with an emphasis on teaching methods to optimize clinical teaching. When I re-joined the UW in 2012, I accepted a position to direct the Faculty Development Program (FDP) for Hospital Medicine. My work in that role is detailed under "Curriculum Development," here I describe my direct teaching of faculty through other venues (section i) or as part of the FDP (section ii). In addition to the FDP stand-alone talks, I created a peer observation program with the assistance of my colleague Dr. Daniel Cabrera. As part of this program, we trained our colleagues in peer observation and feedback – the evaluations from these direct teaching efforts are also summarized below (section iii). These data demonstrate that I have succeeded in my effort to provide high yield and practical teaching. The evaluations are consistently high and faculty praise my teaching effectiveness throughout. Please see additional direct teaching of faculty under "Regional / National / International Recognition."

Background on work in this area

i. Local talks and workshops for faculty	
<ul style="list-style-type: none"> <li>5/12/2009 - Education in Systems-Based Practice: The Larger Context                             <ul style="list-style-type: none"> <li>University of California, San Francisco, Division of Hospital Medicine Grand Rounds</li> </ul> </li> </ul>	
<ul style="list-style-type: none"> <li>4/27/2011- Structured Peer Observation and Feedback to Optimize Attending Teaching                             <ul style="list-style-type: none"> <li>Oral Presentation at the University of California at San Francisco Medical Education Day</li> </ul> </li> </ul>	
<ul style="list-style-type: none"> <li>8/27/2013 - Medicine Morbidity and Mortality Conference                             <ul style="list-style-type: none"> <li>Chair's Rounds, University of Washington Medical Center</li> </ul> </li> </ul>	
<ul style="list-style-type: none"> <li>4/4/2014 - A workshop on workshops (It's a workshop)                             <ul style="list-style-type: none"> <li>University of Washington Teaching Scholars Program</li> </ul> </li> </ul>	
Evaluation	Selected comments
- n = 3 (of 12 attendees), 5-point scale - "Overall the session was taught well" = 5.0	"This was a very practical workshop on giving workshops – I walked away with some actionable things I can do to prepare for my next workshop."
<ul style="list-style-type: none"> <li>1/16/2015 - How to do faculty development.                             <ul style="list-style-type: none"> <li>University of Washington GME, New Program Director and Administrator Orientation</li> </ul> </li> </ul>	
Evaluation	Selected comments

List of teaching sessions and workshops on the topic

Evaluation information: Scores and comments



# A Way To Present Isolated Lectures

**Internal Medicine Residency Lunch Conference Lectures:** Since 2005, I have delivered lectures as part of the Internal Medicine Residency training program educational series. Topics I have covered during these lectures include:

- Asthma and COPD
- Arterial Blood Gases
- Diagnosis and Management of COPD
- Diving Physiology and Medicine
- Environmental Medicine
- High Physiology and Medicine
- How to Troubleshoot Problems With Mechanical Ventilation
- Liberation From Mechanical Ventilation
- Managing Acute Respiratory Failure
- Managing Hypoxemic Respiratory Failure
- Pulmonary and Critical Care Medicine in the Pregnant Patient
- Pulmonary Function Tests and ABGs
- Pulmonary Hypertension
- Pulmonary Vascular Disease
- Respiratory Physiology in the ICU
- Sepsis: Recognition and Management
- The Basics of Mechanical Ventilation
- The Pulmonary Effects of Illicit Drugs
- The Work-up of Pleural Effusions

The number of lunch conference lectures I have delivered each year since joining the faculty is as follows:

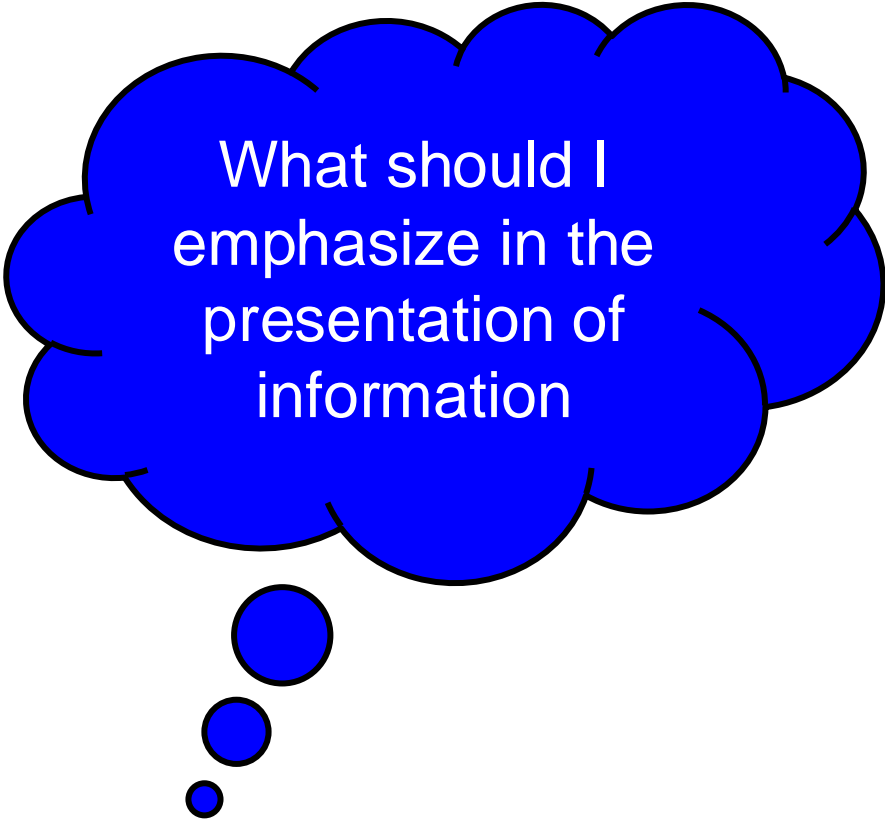
2008	2009	2010	2011	2012	2013	2014
7	5	4	3	3	3	4

Examples of the PowerPoint slide decks from two lectures I give to the residents are provided below (see the following page). The slides in these images represent only a portion of the slides used in each lecture.

**Single lectures do not generally warrant detailed listings**

**You can represent the volume of such lectures that you have done over time**

## Question 2



What should I  
emphasize in the  
presentation of  
information



# Three Items To Emphasize In The Portfolio



**Effectiveness**



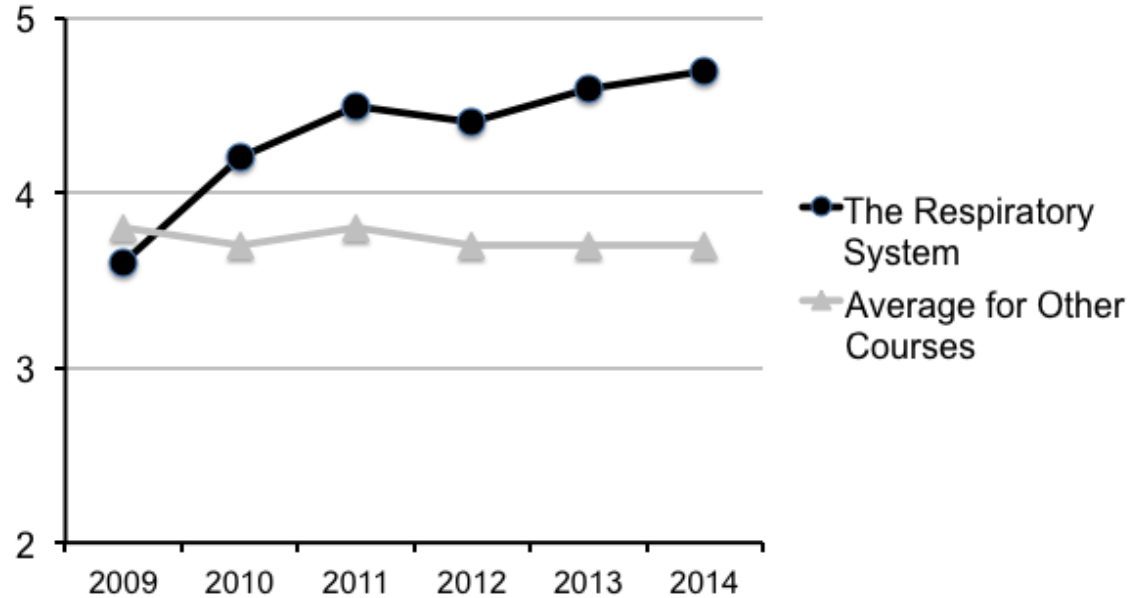
**Improvement**



**Scholarship**

# Documenting Effectiveness

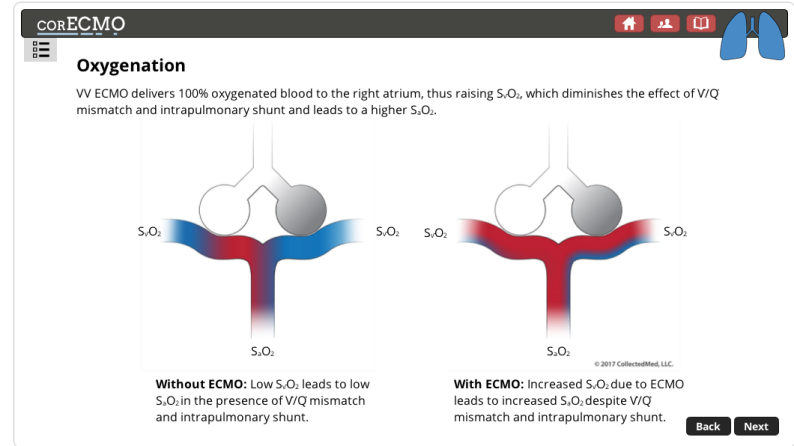
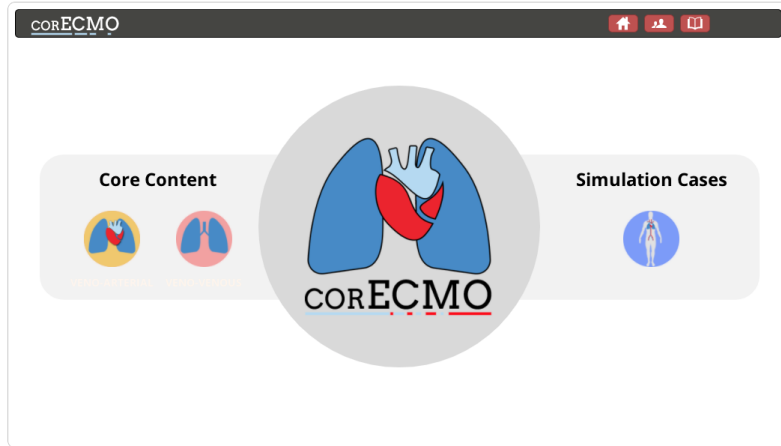
Show how you  
measure up to peers



# Show Off Your High Quality Work

## CorECMO

Web-based tutorial created by Jenelle Badulak



Opportunities to do this will be limited in the new format

# Documenting Improvement

<b>Evaluation Area (0 = worst; 5 = highest)</b>	<b>2010</b>	<b>2011</b>	<b>2012</b>
Content	4.0	4.5	5.0
Interactive with audience	4.2	4.5	5.0
Time for questions	3.5	4.0	4.7
Adequacy of handout	4.2	4.3	4.5
Overall quality	4.0	4.2	4.8

**All evaluations – good and bad – go in your promotions packet.  
The portfolio allows you to craft a story about them**

# What Is Educational Scholarship?

**Education  
scholarship**

**≠**

**scholarly  
education**

**Education  
scholarship entails  
treating your  
teaching work as  
scientists treat  
their research**

# An Example Of Educational Scholarship

## SEMINARS FOR EDUCATORS

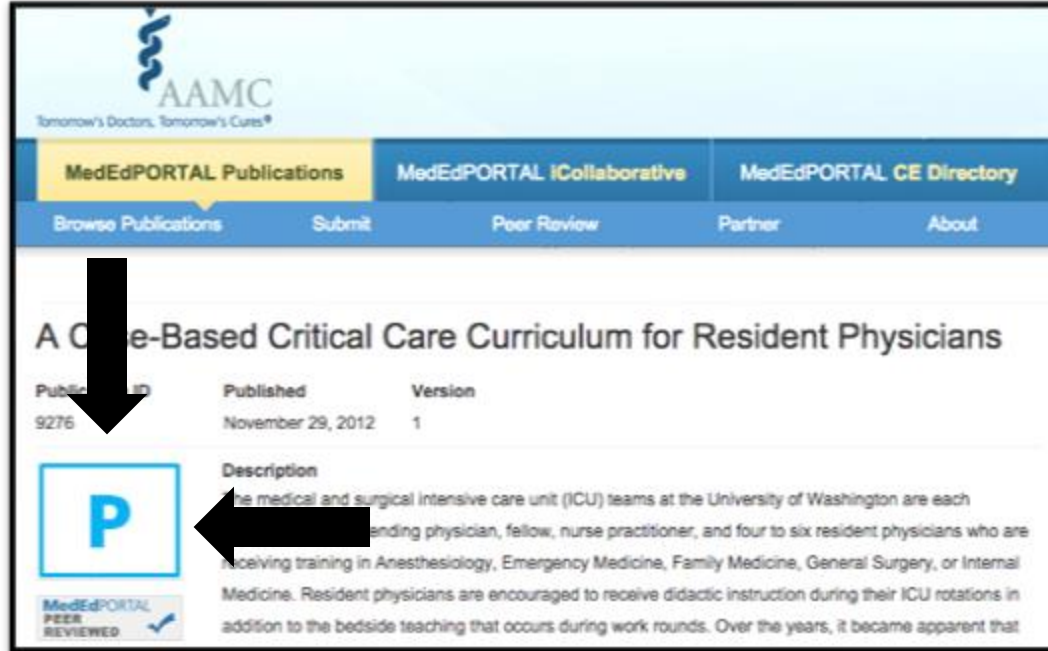
### **Practical Strategies for Effective Lectures**

Peter H. Lenz<sup>1</sup>, Jennifer W. McCallister<sup>2</sup>, Andrew M. Luks<sup>3</sup>, Tao T. Le<sup>4</sup>, and Henry E. Fessler<sup>5</sup>

<sup>1</sup>Division of Pulmonary, Critical Care, and Sleep Medicine, Department of Medicine, University of Cincinnati, and <sup>2</sup>Division of Pulmonary, Allergy, Critical Care, and Sleep Medicine, Department of Medicine, Ohio State University Wexner Medical Center, Columbus, Ohio; <sup>3</sup>Division of Pulmonary and Critical Care Medicine, Department of Medicine, University of Washington, Seattle, Washington; <sup>4</sup>Section of Allergy and Immunology, University of Louisville, Louisville, Kentucky; and <sup>5</sup>Division of Pulmonary and Critical Care, Department of Medicine, Johns Hopkins University School of Medicine, Baltimore, Maryland

## Review Article

# An Example Of Educational Scholarship



The screenshot displays the MedEdPORTAL website interface. At the top left is the AAMC logo with the tagline 'Tomorrow's Doctors. Tomorrow's Cures®'. Below the logo are three navigation tabs: 'MedEdPORTAL Publications' (highlighted in yellow), 'MedEdPORTAL iCollaborative', and 'MedEdPORTAL CE Directory'. Underneath these are five sub-navigation links: 'Browse Publications', 'Submit', 'Peer Review', 'Partner', and 'About'. The main content area features the title 'A Case-Based Critical Care Curriculum for Resident Physicians'. Below the title is a table with three columns: 'Publication ID', 'Published', and 'Version'. The first row contains the values '9276', 'November 29, 2012', and '1'. Below the table is a 'Description' section. To the left of the description is a blue square icon with a white letter 'P', and below it is a 'MedEdPORTAL PEER REVIEWED' badge with a checkmark. Two black arrows point to the 'Publication ID' and the 'P' icon.

Publication ID	Published	Version
9276	November 29, 2012	1

**Description**  
The medical and surgical intensive care unit (ICU) teams at the University of Washington are each consisting of one attending physician, fellow, nurse practitioner, and four to six resident physicians who are receiving training in Anesthesiology, Emergency Medicine, Family Medicine, General Surgery, or Internal Medicine. Resident physicians are encouraged to receive didactic instruction during their ICU rotations in addition to the bedside teaching that occurs during work rounds. Over the years, it became apparent that

**MedEdPortal publication  
by Başak Çoruh**

# An Example Of Educational Scholarship

## ORIGINAL RESEARCH

### Let's Talk Critical

#### Development and Evaluation of a Communication Skills Training Program for Critical Care Fellows

Aluko A. Hope<sup>1</sup>, S. Jean Hsieh<sup>1</sup>, Jennifer M. Howes<sup>1</sup>, Adam B. Keene<sup>1</sup>, James A. Fausto<sup>2</sup>, Priya A. Pinto<sup>2</sup>, and Michelle Ng Gong<sup>1</sup>

<sup>1</sup>Department of Medicine, Division of Critical Care Medicine, and <sup>2</sup>Department of Family and Social Medicine, Palliative Care Program at Albert Einstein College of Medicine of Yeshiva University, Bronx, New York

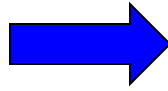
## Education Research

There will be opportunities to describe educational scholarship  
in the new version of the portfolio



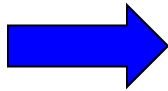
# Whether To Focus On Generating Scholarship Depends On The Timing

**Early career / promotion  
consideration far off**



**Plan and generate  
scholarship**

**Working on my portfolio  
now for my packet**



**No more time to do  
scholarship**

# What About Your Educational Activities

**What teaching am I doing?**

**Am I getting evaluations?**


**Is there a chance for scholarship?**



**Let's take a few minutes to jot down  
some thoughts**



# Question 3



Where do I get all  
of this information  
to populate the  
portfolio?

# There Are Two Primary Sources Of Information For Populating The Portfolio

Records that you maintain and organize during your career

Your personal file in your department or division

# Start Holding Onto Everything!

Evaluations

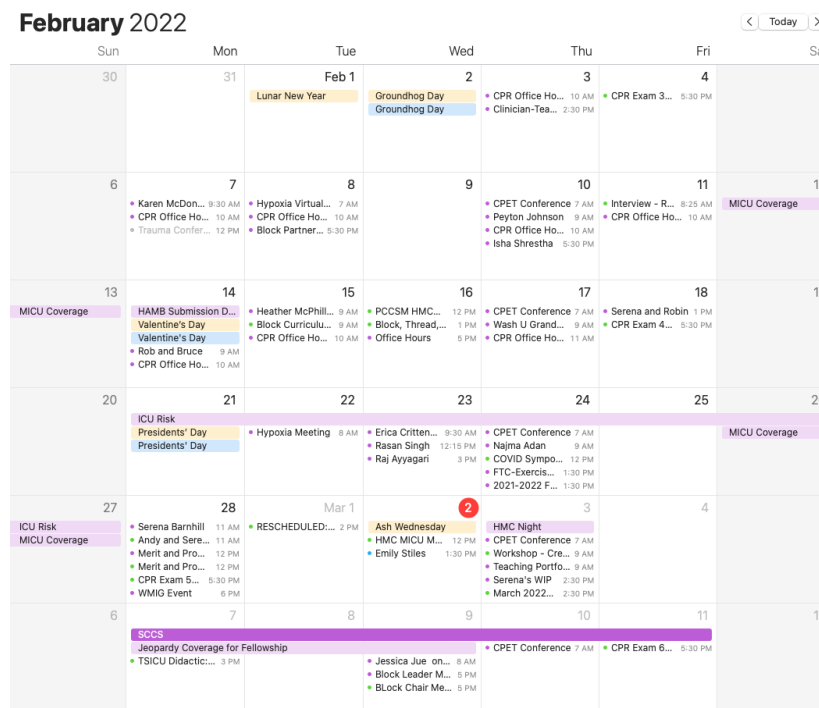
Publications

Thank you  
letters

Informal  
feedback

**Not all of it will go in the portfolio, but having the material available helps you build the portfolio**

# Do Not Expect To Recreate Your Teaching Efforts From Your Work Calendar



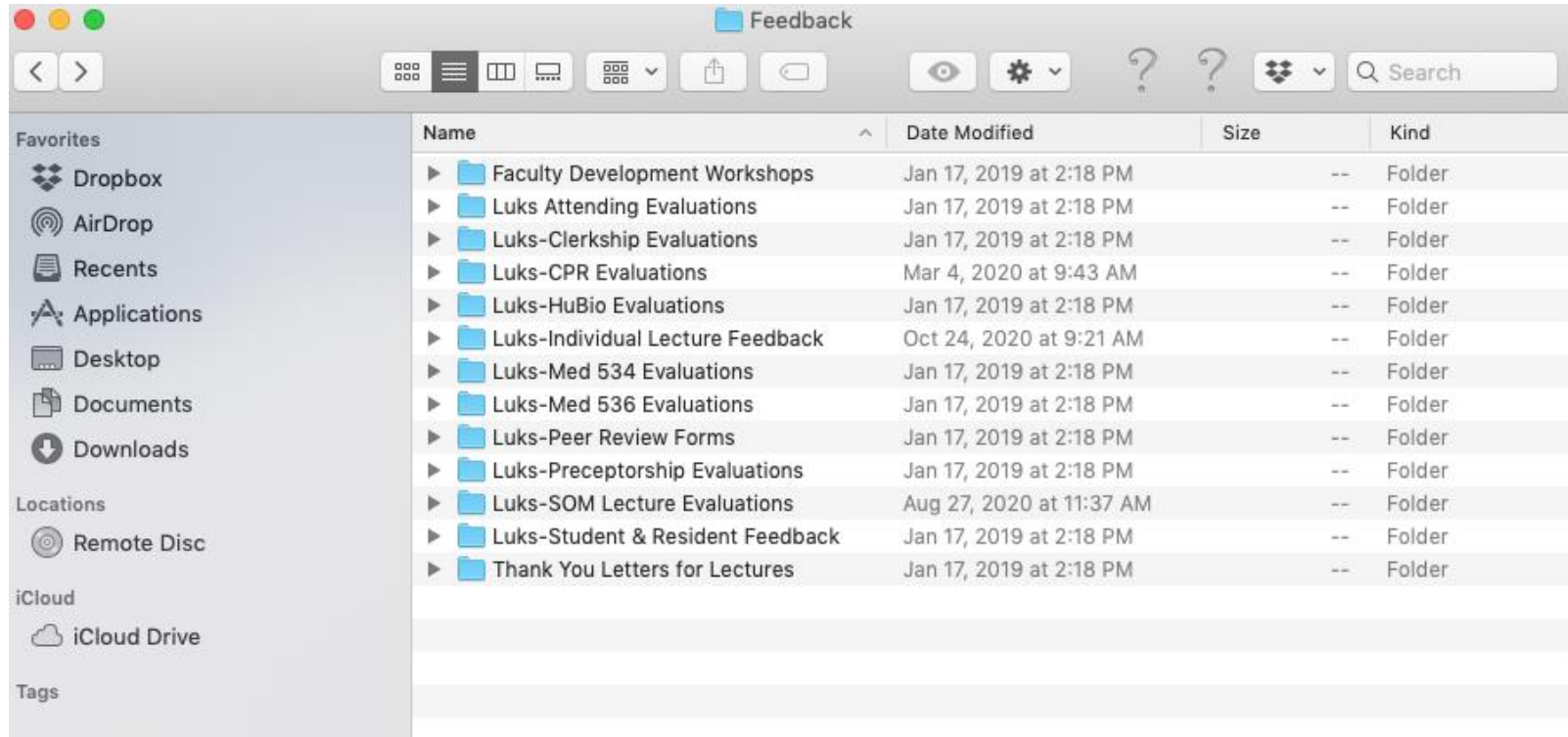
# One Way To Keep Track Of Teaching Activities

A	B	C	
Group	Title	Date	
95	3rd Year Medical Students IM Rotation	Pulmonary Medicine	8/6/10
96	Nursing 533	Outpatient Management of COPD	8/6/10
97	HMC Chief of Medicine Rounds	Massive Hemoptysis	8/7/10
98	HMC Medicine Residents	Respiratory Failure	10/11/10
99	Respiratory & Critical Care Conference	High Altitude Physiology	10/14/10
100	3rd Year Medical Students IM Rotation	Pulmonary Medicine	10/28/10
101	Medic One Paramedic Student Training	Obstructive and Restrictive Lung Disease	11/30/10
102	Medic One Paramedic Student Training	Pulmonary Edema and Pulmonary Embolism	11/30/10
103	Medic One Paramedic Student Training	Respiratory Emergencies	12/2/10
104	Respiratory & Critical Care Conference	Pregnancy and Pulmonary and Critical Care Medicine	12/2/10
105	HMC Medicine Residents	High Altitude Physiology and Medicine	12/15/10
106	HMC Chief of Medicine Rounds	Outpatient Case Discussion (COPD, Pleural Effusions)	1/11/10
107	UW Primary Care Residents	PFT Cases	1/24/11
108	HMC Chief of Medicine Rounds	Complications of Diving	2/22/11
109	Respiratory & Critical Care Conference	Less Invasive Hemodynamic Monitors in the ICU	2/24/11
110	UW Nuclear Medicine Residents	Pulmonary Embolism	3/29/11
111	UW Resident Teaching Conference	Pregnancy and Pulmonary and Critical Care Medicine	3/31/11
112	Trauma Conference	Pregnancy and Critical Care Medicine	4/18/11
113	Nursing 533	Outpatient Management of COPD	5/10/11
114	UW Pediatric Residency Wilderness Medicine	High Altitude Physiology and Medicine	6/15/11
115	Respiratory & Critical Care Conference	Hemodynamic Monitors You Will Use in the ICU	8/11/11
116	HMC Medicine Residents	How To Interpret Arterial Blood Gases	8/12/11
117	3rd Year Medical Students IM Rotation	Pulmonary Medicine	8/11/11
118	HMC Medicine Residents	Pregnancy and Pulmonary and Critical Care Medicine	9/12/11
119	HMC Chief of Medicine Rounds	Oxygen Delivery	11/22/11
120	Medic One Paramedic Student Training	Obstructive and Restrictive Lung Disease	11/23/11
121	Medic One Paramedic Student Training	Pulmonary Edema and Pulmonary Embolism	11/23/11
122	Medic One Paramedic Student Training	Respiratory Emergencies	12/1/11
123	HMC Medicine Residents	Obstructive Lung Diseases	12/5/11
124	HMC Medicine Residents	High Altitude Physiology and Medicine	12/16/11
125			
126			
127			

Separate worksheets for different types of activities



# One Method For Storing What You Gather



# Some Divisions And Departments Have Tools To Gather Peer Evaluations

**Luks, Andrew - Peer Teaching Evaluation**

\* Required

1. Email: \*  
Responses are anonymous. Email address is requested for tracking purposes only.  
Enter your answer

2. Title or subject of the course, lecture or presentation you observed: \*  
Enter your answer

3. Date of presentation: \*  
Please input date (M/d/yyyy)

4. Evaluator: \*  
 Faculty  
 Fellow  
 Housestaff  
 Staff

5. Content was accurate and up-to-date: \*  
Select your answer

6. Presentation was clear and organized: \*  
Select your answer

Screenshot

**An email is sent when faculty notify staff that they gave a talk**

**Information can be stored in department files and easily retrieved when needed**

**Space available for written comments**

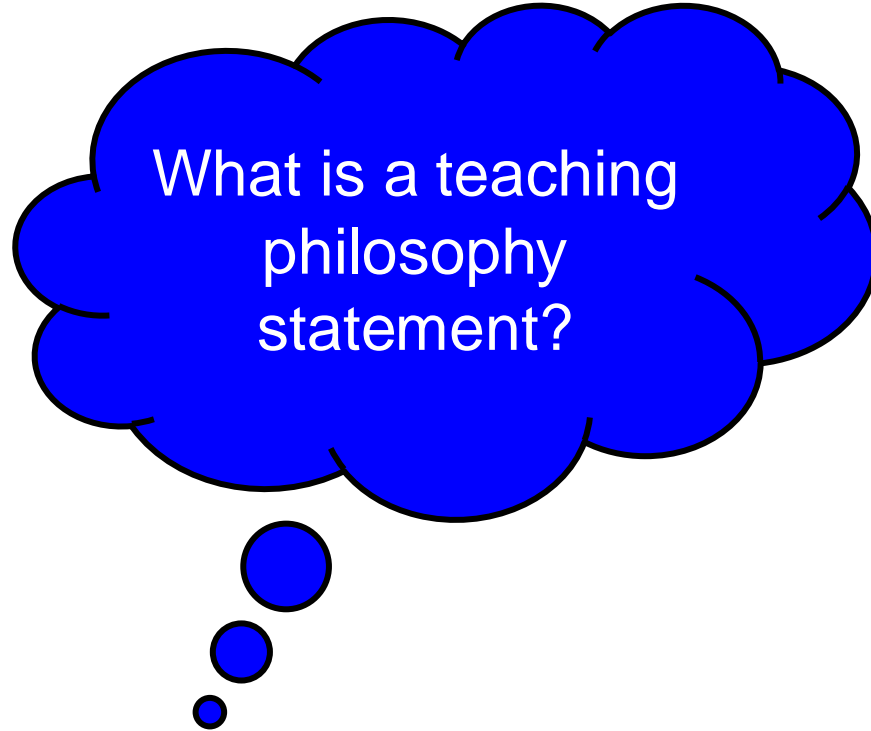
# Another Option For Gathering Evaluations



**Place a QR code at the end of a talk for learners to readily access a teaching evaluation**

**Codes can be created through your division/department or independently  
(e.g. <https://myqrcode.com/>)**

# Question 4



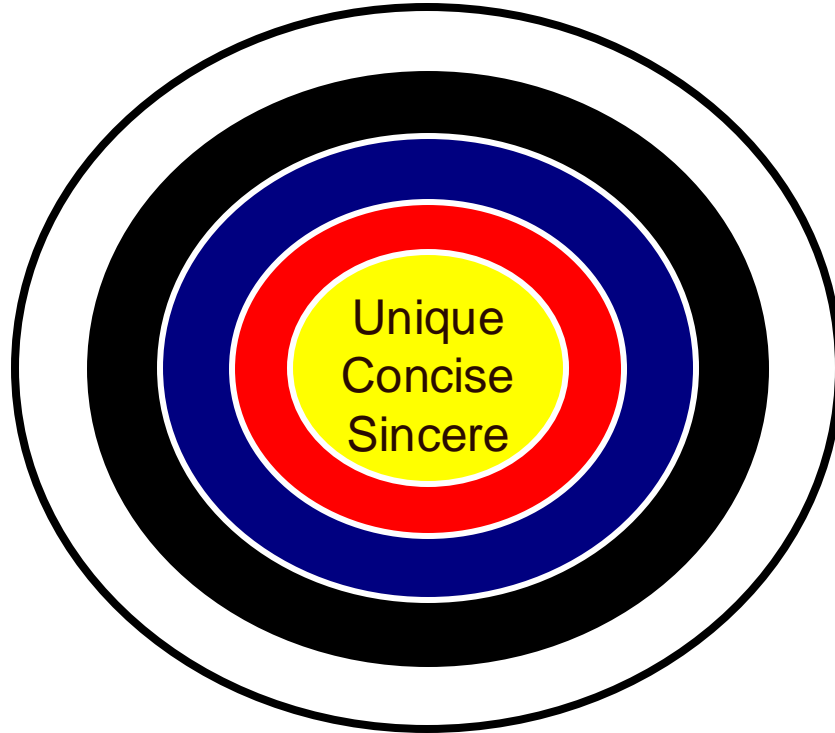
What is a teaching  
philosophy  
statement?

# The Teaching Philosophy Statement

- The educator's "personal statement"
- No absolute requirements: the goal is to show your:
  - Understanding of your teaching role
  - Philosophical and theoretical basis to your teaching
  - Commitment to teaching and improvement
- Often limited by departments to one page maximum

The new portfolio guidelines may not include this, but you will still need to discuss your philosophy in your promotion packet's self assessment

# The Target For A Teaching Philosophy Statement



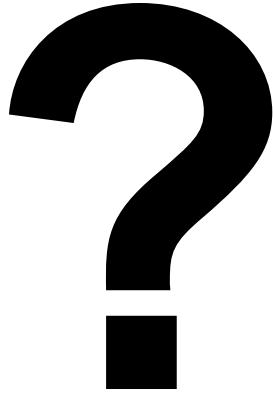
# Let's Look At Some Examples From School Of Medicine Faculty

You should have received a packet of teaching philosophy statements from UW SOM faculty ahead of today's session. A copy has been placed in the chat section.


# Let's Take Some Time To Jot Down Thoughts About Our Own Philosophy







# Question 5



What does this all  
look like in the  
end?

# What Portfolios Used To Look Like



**Teaching Portfolios for  
Terry Massagli**

**Department of  
Rehabilitation Medicine**

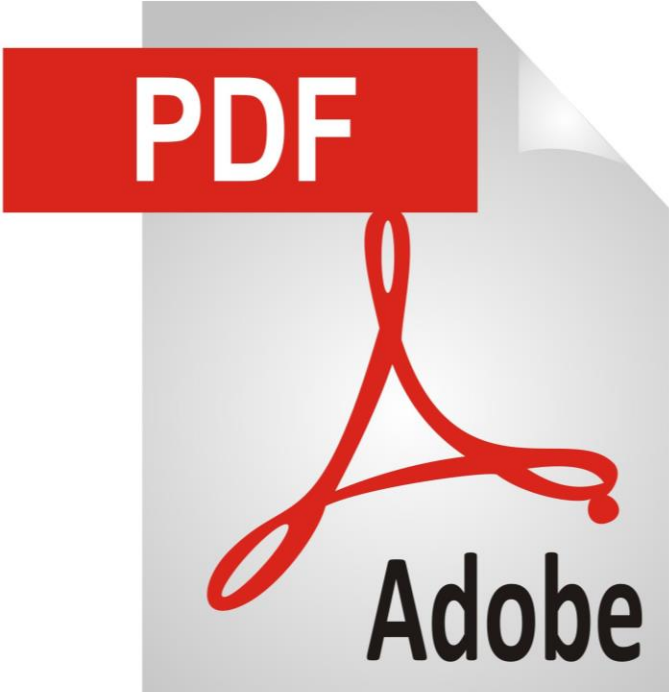


**Teaching Portfolio and  
Appendix for Mark Whipple**

**Department of  
Otolaryngology**

\* Depending on department requirements

# Everything Is Electronic Now!



# How Long Should My Portfolio Be?

## Unclear Things

Exact length  
requirements

How many people  
actually read it

## One Clear Item

“If your portfolio is too  
long, the only  
person who will read  
it is you.”

**Clarify your department's expectations before you start!**

**Time to Wrap Things Up!**

# Key Points About The Teaching Portfolio



**Talk to your division/department administrator about the expectations before you create your portfolio**



**Do not expect it to all come together in one sitting two days before your promotions packet is due**



**Be proactive about gathering and organizing information for the portfolio *as you go along***



**Keep looking for ways to turn your teaching work into educational scholarship**

# Additional Resources



A teaching portfolio is required for regular faculty (lecturers, assistant professors and associate professors) who are being considered for promotion. The teaching portfolio is a critical document in the promotion review process, particularly at the school and provost levels. The portfolio represents your teaching record and is used to assess the quality and value of teaching and mentoring interactions with students, residents, fellows, practicing physicians, and other professionals.

[Teaching portfolio guidelines and resources \(Department of Medicine\)](#)

[How to create a teaching portfolio](#)

[Self-reflection on teaching](#)

Below are two example teaching portfolios and self-assessments for you to consider as you plan your path to promotion.

[Example teaching portfolio 1 \(published with permission\)](#)

[Example self-assessment 1 \(published with permission\)](#)

[Example teaching portfolio 2 \(published with permission\)](#)

[Example self-assessment 2 \(published with permission\)](#)



<https://faculty.uwmedicine.org/promotions/>



# Some Final Helpful Advice



**Chris Knight**  
**General Internal Medicine**

“You will find yourself at once overwhelmed by the number of things that you might put into your portfolio and anxious that it won't be enough. *That feeling is normal.*”

**Thanks For Listening!**

**Questions?**  
aluks@uw.edu