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# STATUS REPORT OF THE PORTFOLIO OVERSIGHT COMMITTEE

Patty Robertson MD and Mike Harper MD, Chairs

June, 2009

## CHARGE TO THE COMMITTEE

### 2008 – 2009:

- 1) Communicate about and support portfolio across UME/GME curriculum
- 2) Serve as an ambassador for portfolios,
- 3) Support pilot initiatives,
- 4) Present regular status reports to CCEP and GMEC,
- 5) Design specific characteristics of an electronic portfolio system including
  - a. training for faculty, staff and learners,
  - b. the effective components of a portfolio based on best practices including portfolio evidence and rubrics and evaluation of them and purposes, milestones and timeliness for formative and summative assessments for each learner level in collaboration with the Director of Student Assessment and Director of Graduate Medical Education Curriculum,
  - c. mentoring structure including faculty development, faculty to learner ratios, form and frequency of communication, roles and responsibilities,
  - c. program evaluation in collaboration with Director of Program Evaluation and
- 6) Select an electronic portfolio system from an internal or external vendor that meets the proposed design,
- 7) Foster and support the scholarship of portfolios

## 2009 – 2010: OBJECTIVES

Please consider the objectives for this upcoming academic year after considering information below based on progress toward meeting the charge

1. Identify, nurture and support portfolio pilots
2. Assess pilot projects and recommend strategies for successful implementation
3. Assess ePortfolio technology as implemented through pilots
4. Facilitate communication and sharing of best practices by portfolio pilot groups
5. Foster portfolios across the health professions and interprofessional activities
6. Advocate for resources necessary for successful portfolio implementations and management
7. Foster and support the scholarship of portfolios

## MECHANICS OF THE PORTFOLIO OVERSIGHT COMMITTEE:

A large UME/GME committee with representation from the dental, nursing and pharmacy schools has met monthly since April of 2009. GME Leadership changed from Lee Learman MD PhD as initial GME Co-Chair who then left UCSF to assume outside department chair, replaced several months later with Mike Harper MD as GME Co-Chair. He who joined UME Co-chair Patty Robertson MD, neither of whom had served on the EPIC Committee whose work preceded this Committee. SOM IT Jesse Friedman later joined, who works with Chandler Mayfield on this project under the supervision of Kevin Souza. Administrative support for the Committee was provided several months later by Kristen Fitzhenry. Feedback from focus interviews of the committee half-way through the year, resulted in the formation of an executive committee which now also meets monthly to provide more effective leadership for this large committee. There has been outstanding attendance at all meetings.

## WORK ACCOMPLISHED 2008 – 2009

- a) Platform chosen for the electronic portfolio after consideration by the committee of multiple products. Mahara is now in a trial period, accessed through Moodle, and “skinned” to match the CLE. Cost: \$3825 for 17 months. Decision to be made March 2010 whether to continue with this product. An assessment of the product will be made prior to that time, from a combination of surveys to the users, as well as consideration to technical issues, and limitations.
- b) Working groups formed for the year which contributed in varying ways to the development of the UME and GME portfolios, each co-chaired by a UME and a GME faculty member: benchmarking, mentoring, communications, technology tools, learner-centered value, and process evaluation. For this next year, the working group members have been asked to join a team voluntarily to assist with a specific portfolio that is being developed.
- c) Template developed for the UME portfolio, which will be further individualized for the JMP, PRIME, and two of the four Advisory Colleges. This 50% use will create an opportunity for a cohort study by a Teaching Scholar for program assessment before the UME portfolio will be

used for the entire first year medical school class fall of 2010. Lorianna Leard MD is working on the proposal, and will include whether the use of the UCSF UME portfolio enhances the mentor/mentee relationship as well as career advising.

- d) Workshops provided for teams (faculty and their administrator) to develop their individualized plan for their portfolio. Two half-day sessions were held on different days. Template was filled out prior to workshop. Ten programs have submitted portfolio plans and now have individual meetings set up in June with a team for technical support, scholarship, and oversight (Pulmonary Fellowship, Global Health Pathways to Discovery, Health Professions Education Pathway, Joint Medical Program, Residency in Ob-Gyn, Residency in Pediatrics, Pediatric \Sub-specialty Fellows, PRIME, Residency in Psychiatry, Scholarship Oversight Committee). Five other programs have plans that are under development (i.e. they attended the workshop). Additional program portfolio plans are welcomed by the executive committee at any time. Gitanjali Kapur will provide technical assistance for GME portfolio planning, and for UME, Jesse Friedman.
- e) Curriculum ambassadors this summer will be using Mahara to work out impediments, and hopefully will assist in coaching members of the first year class this fall who are in the pilot program for the UME portfolio.
- f) Establishment of a Wiki site for the Committee with a scholarship part with recent scholarly publications on portfolio for committee members to read, as well as AAMC Portfolio Consortium's Guiding Principles, agendas, working group reports, etc.

## PLANS FOR 2009 – 2010

- a) Implementation of selected GME projects for new and continuing residents by June 2009
- b) Program Evaluation developed for GME portfolios
- c) Implementation of UME portfolio for 50% of entering class in School of Medicine 2009 (Advisory Colleges of Hughes/Mack, Miller/Diab), plus JMP and PRIME
- d) Program Evaluation by Lorraine Leard MD for UME Portfolio
- e) Mahara Evaluation by Chandler Mayfield and Jesse Friedman
- f) Portfolio Executive Committee to meet every month
- g) Portfolio Oversight Committee to meet every two months: agenda will mostly be filled with presentations of different portfolios. Template will be developed for these presentations, and a member from each team will be asked to join the Portfolio Committee. Meetings will be open to all.
- h) Members of the teams working on portfolios with notification of which portfolios will be discussed at which meeting, so that all team members can view what the other teams are doing.

## CHALLENGES

- a) No specific mechanism currently for providing technical support for GME portfolios
- b) Getting faculty on board: luke-warm reception at ECSC when update on the Portfolio Project was presented
- c) Getting students excited and motivated to do their portfolio: figuring out how to present it to them so that is an advantage to them to do a portfolio
- d) Bridging the transition from UME portfolio to GME portfolio for UCSF students who remain at UCSF for residency: the Pathways project portfolio may be helpful with this as it includes UME and GME
- e) Streaming in evaluative data if student wishes to from existing UCSF sources like eValue