



Memo from: Lisa Bellini, MD, Senior Vice Dean of Academic Affairs
RE: PSOM Committee on Teaching and Educational Service: Defining and Quantifying Faculty Educational Contributions

Original: October 16, 2018
Revised: May 15, 2021
Revised July 1, 2022

A major role of PSOM faculty is the dissemination of knowledge through educational contributions. The ability to value educational contributions is critically important for faculty reappointments, promotions and awards, as well as to formally document the level of educational engagement by our faculty. In the fall of 2021, PSOM adopted a revised framework for promotion, focusing on trajectory and impact. The purpose of this document is to align educational categories with that framework, and provide a common value system for education across the school.

1. DEFINITION OF RELEVANT AUDIENCES FOR EDUCATION CONTRIBUTIONS

Includes instruction, assessment, and other educational effort provided to any learner population affiliated with the University of Pennsylvania, Penn Medicine and any educational programs or activities sponsored by Penn, including

- Undergraduate and post-baccalaureate students
- Medical students
- Residents and fellows (including non-Penn trainees rotating to Penn Medicine or CHOP sites)
- Post-doctoral fellows (or trainees)
- Graduate students
- Preprofessional students (NPs, PAs, Pharmacists, etc.)
- Community members taught at secondary schools, community centers, places of worship, etc.
- Peers when taught on behalf of PSOM Advance Faculty development programs or CME programs sponsored by Penn or CHOP
- Interdisciplinary lectures and FLAs to non-trainees can be used to meet up to 50% of the teaching requirement per year.

2. ANNUAL REQUIREMENTS FOR EDUCATION CONTRIBUTIONS

- Tenure/CE/AC- minimum of 100 credits per year
- Clinical faculty appointments-minimum of 50 credits per year
- While it is the intention of this policy that all faculty meet their annual educational requirements in order to maintain their faculty appointment, department chairs will have discretion to modify individual faculty assignments to ensure that a department meets its responsibilities to PSOM's education mission, and for other compelling reasons.
- As is current practice, faculty will be responsible for tracking and reporting their educational activities using a PSOM or CHOP provided standard template.

3. EDUCATION ACTIVITIES AND VALUE:

- The value, or relative worth, of educational activities will be expressed as credits.
- The credit value assigned to specific educational activities are defined by PSOM as outlined below, rather than by individual teachers, course directors, or departments.
- Credit reflects time spent in preparation, exam grading/feedback, and evaluation of education related activities. It does not reflect the number of trainees engaged.
- Educational activities (specifically online educational activities) receiving royalties are not eligible for credit.

4. CATEGORIES OF EDUCATIONAL IMPACT

Teaching

- Lecture: Live or pre-recorded presentation that is intended to teach and is delivered to an audience of any size.
- Facilitated Learning Activity (FLA): Individual or group activity conducted in-person, electronically or through simulation in which the teacher engages the student(s) through discussion, cases, questions, etc. to enhance learning such as small groups, faculty precepted case conferences (e.g., pathology case conferences, radiology case conferences), directed journal clubs, scholarly pursuit, etc.
- Clinical teaching: Supervision and teaching of one or more trainees in clinical settings including outpatient practices, inpatient services, procedure units, diagnostic sessions such as sign out, operating rooms, etc.

Learner Assessment

- Applies to faculty who spend time grading exams or participating in various assessments of trainees (ie, direct observation, prelim qualifying exams)
- Curriculum/Course development
- The development and implementation of curriculum at any trainee level.
- The creation of a course or program that is subsequently taught online or in person (i.e. MOOC, Certificate or master's program)

Mentoring and Advising

- Includes relationships that are intended to facilitate trainee career development such as advising of students on selections of courses and rotations, capstone projects, thesis committee chairs, qualifying exam (“prelim exam”) membership, etc.
- Includes activities designed to promote success of underrepresented trainees in medicine such as career fairs, panel discussions, etc.
- Supervision of trainee developed scholarly projects such as a manuscript, abstract, poster, platform presentation, lecture, workshop, curriculum, grant proposal to an external funding agency, etc.
- Lab rotations/Pre-thesis research, and Short-term research-related mentoring and supervising: Specifically applies to BGS where students rotate through different labs for a predetermined period of weeks, where post-baccalaureate students, undergraduates and high school students are mentored on research projects for defined durations, and where graduate students and postdocs receive formal training in the responsible conduct of research (RCR).

Educational Leadership and Administration

- Applies to faculty serving in leadership roles for UME courses, GME, BGS and masters programs and those participating on key educational committees.

Educational Scholarship

- Publishing in educational scholarship

5. CREDITS:

Teaching

Lecture and Facilitated Learning Activities (FLA) (incorporates prep time): 4 credits per lecture/FLA hour (New, revised and old lectures/FLA are equivalent)

Clinical teaching: Credit will be given based on total number of sessions in the ambulatory, diagnostic and procedural areas, total number of days for OR and inpatient service time, and being called in from home:

- 1 credit for a half-day clinic, half-day procedure session, half day diagnostic session, weekend inpatient service day spent and being called in from home with trainees.
 - Ex: 40 credits for 40 weeks of a weekly half-day clinic or diagnostic session.
 - Ex: 1 credit for being called into the hospital overnight and spending at least 4 hr. with a trainee
- 2 credits for an inpatient service weekday or an 8-12 hour shift in the ED.
 - Ex: 144 credits for a faculty member who is on an inpatient service 12 weeks per year with various trainees will receive 2 credits per weekday of service time and 1 credit per day for weekend/holiday service time.
 - Ex: 80 credits for 40 weeks of weekly full day in the OR/procedure suite
 - Ex: 60 credits for 30, 12-hour ER shifts in a year.
- 3 credits for an 18-hour shift.

- 4 credits for a 24-hour period spent in-house on clinical service with trainees.
 - Ex: 40 credits for ten 24-hour days in an ICU.
- There is no difference in credit for number or level of trainees present.
- There is no credit for nighttime phone calls & advice.

Lab rotations/Pre-thesis research, and Short-term research-related mentoring and supervising: Specifically applies to BGS where students rotate through different labs for a predetermined period of weeks, where post-baccalaureate students, undergraduates and high school students are mentored on research projects for defined durations, and where graduate students and postdocs receive formal training in the responsible conduct of research (RCR). Applies to the direct supervision of trainees in the following settings:

- graduate students on lab rotations: 25 credits per student
- undergraduates performing longitudinal research projects for at least 3 months or as part of a summer program: 25 credits
- post-bac students for 1 year: 50 credits

Learner Assessment

- Applies to classes in which learning is evaluated by problem-solving exams (i.e. not multiple choice), or research proposals, and where grading is performed by the lecturer.
- Assessment credit may be granted in addition to credit for Lecture/FLA's.
- Applies to situations where faculty serve as direct observers such as occurs during remediation/coaching of a trainee, or assessment of peer teaching.
- 2 credits/assessment hour.

Curriculum/Course Development

- Leadership role in developing a course for CME, MOOC, certificate or master's program.
- 4 credits per hour for each course hour of content including video and in person modes of delivery. Ex: 24 credits for 6 hours of course content

Mentoring, Advising, Supervising Scholarship

- The following types of mentoring do not count for educational credit: informal mentoring, which involves occasional meetings with trainees; mentoring performed in the context of a supported role in medical education (i.e. course director, program director, etc.); and faculty mentoring.
- Credit for longitudinal mentoring and scholarship cannot be claimed in the same year.
- Each longitudinal mentoring relationship with a trainee of >8 hours per year: 5 credits.
- Faculty who work directly with trainees and participate heavily in the design, conduct, analysis and drafting of trainee **scholarly products** are eligible for credit:
 - Accepted abstracts, posters, oral presentations (internal or external): 5 credits/yr
 - First submission of a manuscript: 10 credits.
 - Thesis/Postdoc advisors: 50 credits annually
 - Grant proposal to an external funding agency: 10 credits
- Each product can only be claimed once, for the year in which it is submitted, even if the trainee has left Penn.

- Multiple faculty can take credit for a trainee’s scholarly product as long as each has participated heavily in the design, conduct, analysis and drafting of the scholarly products of trainees
- Trainee must be an author.

Educational Leadership and Administration

- This category shall recognize the administrative contributions related to education in BGS, Masters programs, UME and residency and fellowship programs. For course and program directors, this credit shall recognize contributions above and beyond their course/program administrative responsibilities.
- Education related committees that require substantial investment of time are eligible for 5 credits per activity per year:
 - Curriculum committees
 - PSOM, BGS, Masters programs admissions committees
 - Residency and fellowship selection committees
 - Program level evaluation, graduate group reviews and clinical competency committees, thesis committees
- Education Leadership Activities
 - Year-long courses or programs (ex-doctoring, program director, clerkship director, BGS director, graduate group chair)
 - Directors: 50 credits
 - Co-Directors: 50 credits
 - Associate Directors: 25 credits
 - Non-yearlong courses (ex-course in module 1, 2, elective directors (when trainees have been enrolled in the elective during the AY), master’s directors, T32 program directors)
 - Directors: 25 credits
 - Co-Directors: 12 credits
 - Associate Directors: 12 credits
 - Clinical electives: 25 credit