

Continuing Educational Development and Harmonisation of Expert Teachers
in General Practice/Family Medicine in Europe through a systematic process
of quality improvement (CEDinGPll)
Leonardo da Vinci Project No. 2013-1-PL1-LE005-37537

Handbook for applicants

Document describing the process
of appraising the level of expertise
in General Practice/Family Medicine teachers



HANDBOOK FOR APPLICANTS

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of appraising the level of expertise
in General Practice/Family Medicine teachers



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Leonardo da Vinci Project 2013-1-PL1-LEO05-37537

Continuing Educational Development and Harmonisation of Expert Teachers in General Practice/Family Medicine in Europe through a systematic process of quality improvement

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3. European Academy of Teachers in General Practice and Family Medicine (EURACT)
4. Institute for Development of Family Medicine, Slovenia
5. Danish College of General Practitioners, Denmark
6. University of Tartu, Estonia
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WHAT IS THIS DOCUMENT ABOUT?

The Handbook for applicants, in addition to being a manual for General Practice/Family Medicine (GP/FM) teachers interested to participate in the appraisal process, provides background for its origin. It also summarizes the methodology for the development of the appraisal system for GP/FM teachers in Europe.

It constitutes one out of four products of the international project *“Continuing Educational Development and Harmonisation of Expert Teachers in General Practice/Family Medicine in Europe through a systematic process of quality improvement”* (No. 2013-1-PL1-LEO05-37537).

The remaining three products include:



A template for use in the appraisal of portfolios of teaching expertise (this provides indicators and criteria for an appraisal process at two levels: ‘Competent’ and ‘Expert’ teacher. For both levels the Template provides the description of what competencies are required from the teacher and lists the types of evidence confirming achievement of the competencies).



A handbook for appraisers (this includes standards and methodological guidance for an appraisal process; it also constitutes a reference document for potential appraisers).



An electronic portfolio of evidence of teaching performance (this operationalizes the comprehensive and complex structure of the Template into a simple, user friendly web-based tool; it includes all indicators, criteria and standards used in the appraisal process; it enables the online collection of evidence by applicants and their assessment by appraisers).

All four project products are interrelated and can be used by different stakeholders and at different stages of the appraisal process.

AIM AND SCOPE OF THE APPRAISAL SYSTEM

A Why is an appraisal system for teachers needed in family medicine?

Family medicine is characterized by its specific set of knowledge, skills and attitudes. While family medicine is a young specialty in most European countries in a few countries it is still not recognized as a specialty. It is therefore necessary not only to demonstrate the values of family medicine, but also to continue the positive development of training programmes for current and future general practitioners/family physicians.

It is the family medicine trainers and teachers who build the standards of future general practice. It is, therefore, relevant to focus on how both the abilities and the recognition of trainers and teachers can be strengthened. Therefore, the European Academy of Teachers in General Practice and Family Medicine (EURACT) has developed a model of teaching expertise for family physicians in Europe. This model is called the *“Framework for Continuing Educational Development of Trainers in General Practice/Family Medicine in Europe”*. The framework has several potential applications. One of them is the potential for developing an international appraisal of family medicine teachers.

The relevance of such appraisal system is underlined by a European setting with increasing cross-border movement of people, including doctors; it is advisable to coordinate and develop standards across the borders of the countries in the European Union for the benefits for all its citizens.

The introduction of an appraisal system for trainers and teachers in family medicine has a triple purpose:

- ✓ to support, develop, and recognize the standard of the individual trainer/teacher;
- ✓ to demonstrate the existing high standards of education/training in family medicine in Europe and the ambition for further development;
- ✓ to coordinate family medicine training throughout the countries in the European Union.

B

How will this be of benefit to you as a teacher?

Family medicine is a complex specialty, building on evidence gathered through medical research but it is also embedded in a bio-psycho-social understanding of patients' individual health problems. Family medicine requires good communication skills and an ability to reflect on one's own performance. Teaching and training in family medicine is therefore challenging and demanding and its teachers should be supported in their professional development throughout their career.

By enrolling into an international appraisal system like the one suggested by EURACT, you will as a trainer and teacher in family medicine be offered a platform for personal professional development of your teaching skills and for an enhanced understanding of the field of medical education in an international perspective.

It will also provide you with a formal recognition and documentation of your GP/FM teaching skills, which will have a personal value that can be used both nationally and internationally.

Family medicine has the ambition to take on a leading role in medical education of high quality. The appraisal process should be seen as a reflection of this.

C

EURACT's role and ambition

Since EURACT subscribes to these aims it has agreed to implement the project, which is expected to lead to and to ensure greater harmonisation and convergence of the GP/FM teachers' competencies at the European level. The EURACT's *Framework for Continuing Educational Development of Trainers in GP/FM in Europe* has been the background document for the development of this process of appraising teachers seeking recognition of their qualifications.

A template, which will be described later, has been developed and provides an appraisal structure by listing and describing evidence to be used in the appraisal process at 2 different levels of competence: the "competent" level and the "expert" level as teacher in General Practice/Family Medicine.



The aim of the template is to ensure that decisions used in appraisal of teacher expertise are reliable, valid and can be applied in a European context.

This handbook was published in 2015 towards the end of the development stage of this appraisal process. EURACT will take over responsibility for implementation of the appraisal process in January 2016 and the process will be subject to evaluation and refinement. As a result of this, small changes may be made to the process and the handbook will be updated. The current version of the handbook will be available on EURACT's website.

D A short description of the process

When you decide to apply for appraisal as either a competent or an expert teacher in general practice you should familiarize yourself with the process and start collecting the appropriate evidence of your teaching skills. The appraisal electronic portfolio will provide you with a suitable way of getting an overview of your teaching skills. You will be able to use the portfolio over a longer time period, so you can collect your evidence and organize it in a continuing process. Please note that you can collect evidence in your own national language if you apply for the competent level – but if you apply for appraisal at the expert level the evidence must be in English. When you have collected all the required evidence you submit your portfolio with a request to be appraised.

The appraisal process is run by:

-  a national educational appraiser if you apply for the competent level.
-  2 international educational appraisers if you apply for the expert level.

The appraisal process will give a “pass” or “not ready yet” conclusion. If it is a “not ready yet” conclusion it will be possible for the applicant to see what further efforts must be done – or where further evidence must be collected.

An appeal process is also possible for “not ready yet” applicants. In this document we will describe how to enrol in the appraisal process.

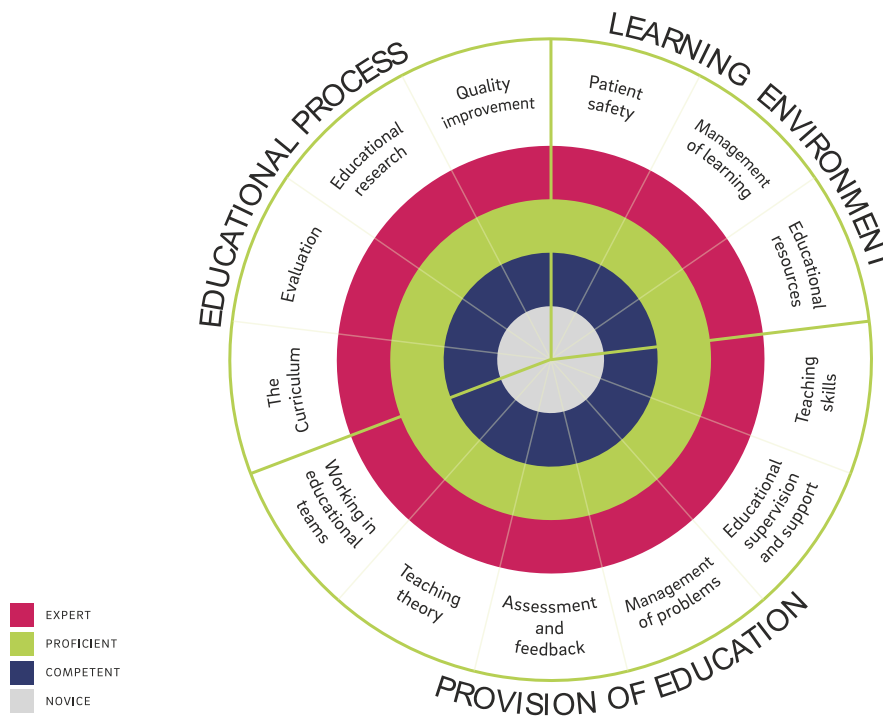
LEVELS OF EXPERTISE AND CRITERIA FOR SUBMISSION OF APPLICATION

A

A description of the Framework document and the domains

The *“Framework for Continuing Educational Development of Trainers in General Practice/Family Medicine in Europe”* document describes four levels of expertise: novice, competent, proficient and expert. For the purpose of this appraisal process, only two levels are used: competent and expert.

The figure shows the four levels of educational expertise organized into 13 domains of teaching competence. The 13 domains are grouped into 3 categories (see the outer circle in figure 1).



Source: “Framework for Continuing Educational Development of Trainers in General Practice/Family Medicine in Europe”, Cracow 2012

Figure 1. Domains of teacher's expertise

The grouping of the domains:

I. Learning environment:

- a) Patient safety
- b) Management of learning
- c) Educational resources

II. Provision of education:

- a) Teaching skills
- b) Educational supervision and support
- c) Management of problems
- d) Assessment and feedback
- e) Teaching theory
- f) Working in educational teams




III. Educational process:

- a) The curriculum
- b) Evaluation
- c) Educational research
- d) Quality improvement

B

A short description of the process

The process of appraisal is made available for any general practitioner/family physician teacher in Europe, who fulfils the following criteria:

-  being actively involved in teaching in general practice/family medicine;
-  having identified a senior colleague as a mentor to support his/her application;
-  the mentor will be asked to certify that, in his/her opinion the applicant is capable of carrying out the work required to be appraised as competent.

Current EURACT members may apply for an appraisal as a benefit of their membership. Non-EURACT members must pay the appraisal fee for entering this process.

TYPES OF EVIDENCE OF EDUCATIONAL COMPETENCIES - AND HOW TO COLLECT THEM

During the appraisal process the applicant has to collect several pieces of evidence, which illustrate his or her teaching competencies.

The **types of evidence** which can be used are listed below:

A personal learning log

This is a record (like a diary) of the applicant learning experiences which are relevant to his/her work as a teacher. This is written by the applicant and will describe the activity, what has been learnt and how that learning is being applied in teaching.

A reference letter

This is written by a senior colleague who is familiar with the work of the applicant as a teacher of family medicine who can attest to the quality of the applicant's teaching and his/her development as a teacher.

A multi-source feedback

This is a structured survey, using a standardised form, of individuals from different backgrounds who have been directly involved in the applicant's work as a teacher. The applicant should include a reflection on the outcome and what has been learnt. Some institutions may have such forms or questionnaires, alternatively these can be developed by the applicant.

Learner evaluations

Evaluations may be from students, trainees, peers, GP teachers or other health workers. The applicant will describe how his/her teaching has changed as a result.

A list of publications

This is a list of published items on medical education in peer reviewed journals, monographs or chapters in books. Each item should include bibliographic data which make it accessible to the assessors or alternatively relevant links should be provided.

Copies of abstracts

These are copies of abstracts of oral contributions or posters presented at national or international conferences, on topics relevant to education in GP/FM. In addition there should be a reflection on their value to the applicant as a GP/FM teacher.

Documentation

This could be certificates (or other evidence) of attendance and participation in educational events for GP/FM teachers, either as a participant or as a member of the course faculty. The applicant must include a brief reflection on the value of each event to his/her development as a teacher.

Learning and teaching resources

There will be a description of educational resources that have been developed by the applicant and used in teaching. This will include a reflection on their value to the applicant as a teacher and to the training programme.

A personal statement

This is a short essay providing information on a specific aspect of the applicant's work as a teacher which has not been demonstrated by the other types of evidence, for example:

- **Reflection** – the applicant may be asked to reflect on a specific aspect of his/her work as a teacher.
- **Description** – the applicant may be asked to describe an aspect of his/her involvement in the health care system and/or medical education system.

Collecting the evidence

Before you start to collect the evidence please carefully note that the type of evidence, which has to be submitted, is limited to above mentioned categories.

In an online portofolio (described in the next section) the applicant can see which type of evidence is needed in relation to each specific domain.

The applicant should provide the evidence requested according to each of the specific domains. On the other hand, one piece of evidence may be used in more than one knowledge domain or area of expertise (e.g. reference letters may cover various areas of competence etc.).

For example a reference letter is required in both the domains: **"Educational supervision and support"** and also **"Management of problems"**. Applicants are able, if they so wish, to use the same letter of evidence in both domains, and this might apply to other types of evidence and other domains. However they must ensure that the content required for both domains is covered by the evidence they supply – note the difference in content in italics below.

Domain: Educational supervision and support



Supervises whole programme and individual elements within it. Supervises other teachers providing appropriate feedback.



Gives successful feedback to learners with complex difficulties, using outside agencies where appropriate.

Reference letter:

Content: A letter from a senior colleague who is familiar with your work as a teacher of family medicine who can attest to the quality of your ability to supervise complex teaching processes.

Domain: Management of problems



Ensures availability of support systems in the organisation either locally or within external sources.



Able to arrange and supervise remediation of problem learners identified (this will include teachers with problems).

Reference letter:

Content: Provide a reference letter from a head of department or any senior colleague who witnessed your problem solving actions.

How to collect and upload the evidence on a practical level is described in the section "The appraisal process" (page 17).

PASS RULES FOR THE „COMPETENT LEVEL” OF EXPERTISE

In order to demonstrate that the applicant has received the level of a competent teacher, the following criteria must be fulfilled:

1. Evidence is required in at least 7 out of the 13 domains
2. Been judged as competent overall in a minimum of 7 of the 13 domains in such a way that:
 - at least 2 of these domains are from area 1 (Learning Environment) and
 - at least 3 of these domains are from area 2 (Provision of Education) and
 - at least 2 of these domains are from area 3 (Educational Process).
3. In each chosen domain at least 2 out of 4 pieces of evidence are required.
4. To be judged overall as competent in a domain the applicant has to be competent in at least 2 pieces of the evidence provided in that domain.

PASS RULES FOR THE „EXPERT LEVEL” OF EXPERTISE

In order to demonstrate that the applicant has received the level of an expert teacher, the following criteria must be fulfilled:

1. Evidence is required in 5 domains chosen to reflect the applicant’s current teaching practice.
2. The required 5 domains must be so that:
 - at least 1 domain is from area 1 – (Learning Environment) and
 - at least 1 domain is from area 2 – (Provision of Education) and
 - at least 1 domain is from area 3 – (Educational Process).
3. The candidate must be judged expert in all of his/her 5 chosen domains.
4. In each domain at least 3 out of 5 pieces of evidence are required (OR 2 out of 5 if the Leonardo EURACT 3 level graduates).
5. In order to judge the applicant as expert the appraisers will have to agree that the applicant is performing at expert level in at least 3 out of all 5 pieces of evidence from the respective domain.
(OR 2 out of 5 if the Leonardo EURACT 3 level graduates).
6. **The candidate must provide a reference letter which confirms that the candidate is at the competent level in the remaining 8 domains (see Appendix No. 1).** The reference letter should be signed by a chosen mentor (head of department or senior colleague).

THE APPRAISAL PROCESS

A An overview

The appraisal of expertise will be carried out using your portfolio of teaching evidence. This is a remote evaluation of the evidence you provide, a face to face meeting will not be required.

The competent level is assessed by one national expert, while the expert level should be assessed by two experts at the international level. This is why the expert level materials must be submitted in English.

For EURACT members application is free – but non-EURACT members must pay a fee when submitting the portfolio and asking for the appraisal.

After the applicant submits the documentation, the appraiser is asked to assess the evidence. This is done online, with the use of a web-based application.

After the appraiser(s) assesses all the evidence, the final judgment is passed to the applicant, who receives a formal recognition and a certificate of his/her expertise if the application is successful.

If unsuccessful the applicant has an option to change the evidence and resubmit.

If however, you feel that the process was not followed correctly you have the right to appeal. The appeal process is also defined – see Appendix No. 2.

The names of the appraisers are kept confidential.

B The practical part



Identify your mentor in the appraisal process.



Access the website "The electronic portfolio of evidence of teaching performance"

- ✓ Choose the level of expertise on which you wish to be appraised (you may wish to discuss it with your mentor)
- ✓ Identify what evidence you already possess and select the domains you are going to focus on (you may wish to discuss it with your mentor)
- ✓ Upload the pieces of evidence to the portfolio in your chosen domains
- ✓ Submit your portfolio as an application for appraisal if the evidence is complete
- ✓ For non-EURACT members: pay the appraisal fee

C The technical part

The appraisal process is run via an electronic portfolio. This e-portfolio is also your personal archive for storing your educational achievements. You access the portfolio via www.euract.eu

This is the opening page of the e-portfolio, where you have to register first.



The screenshot shows the login and registration interface for the electronic portfolio. At the top left is the logo, a stylized 'E' composed of four colored squares (blue, green, yellow, blue). To its right is the text 'The electronic portfolio of evidence of teaching performance'. On the right side, there are navigation links: 'ABOUT THE FRAMEWORK | ABOUT THE APPRAISAL PROGRAMME', 'REQUIREMENTS FOR EXPERT TEACHER | REQUIREMENTS FOR COMPETENT TEACHER', and 'TYPES OF EVIDENCE EN | PL'. The main heading reads 'Welcome to the appraisal programme for teachers in General Practice / Family Medicine'. Below this are two input fields: 'Login' and 'Password'. A 'LOGIN' button is positioned below the login field. To the right of the password field, there is a section titled 'First time here?' with the text 'If you don't have an account please register:' and a 'REGISTER' button. A green circle highlights the 'REGISTER' button, with a line extending from it to the right. On the far right, there is a photograph of a smiling woman with long brown hair, wearing a white lab coat over a green top.

After registering you can enter the system – and please start with creating your profile.

Then you have to choose at what level you want to be appraised: the competent level or the expert level and enter the corresponding section of the portfolio. If in doubt the applicant can decide on level of expertise after studying figure 1 or by discussing with a mentor or by reading the Framework document (there is a link in the e-portfolio).

The screenshot displays the user interface for 'The electronic portfolio'. At the top left is the logo and text 'The electronic portfolio of evidence of teaching performance'. To the right are links for 'HELPDESK' and 'LOGOUT', along with language options 'EN | PL' and a 'Welcome, USER' message. A navigation bar contains 'FORM', 'YOUR PROFILE', and 'ATTACHMENTS'. A green notification bar at the top says 'login correct'. The main heading is 'Select the appraisal level:'. Below this are two cards: 'COMPETENT' and 'EXPERT'. Each card features a progress bar at '0 / 13' and a 'CHOOSE' button. The 'EXPERT' button is highlighted with a green circle.

After choosing the level of expertise the applicant can enter the portfolio, and read about the different areas of knowledge and expertise, in this portfolio named as domains.

Please note it is possible to obtain more information by clicking on the links in the bottom of the webpage.

The screenshot displays the 'The electronic portfolio' web interface. At the top, the logo and name 'The electronic portfolio of evidence of teaching performance' are on the left, and 'HELPDESK | LOGOUT' and 'EN | PL' are on the right. Below the header, there are navigation tabs: 'FORM' (highlighted), 'YOUR PROFILE', and 'ATTACHMENTS'. A 'Welcome, USER' message is on the right. A 'Save to pdf' link is visible above the main content area.

The main content area is divided into three sections:

- Area I: Learning environment**
 - Patient safety
 - Management of learning
 - Educational resources
- Area II: Provision of education** (highlighted with a green cross on the left sidebar)
 - Teaching skills
 - A personal learning log
 - A reference letter
 - A personal statement
 - Learning and teaching resources
 - Educational supervision and support
 - Management of problems
 - Assessment and feedback
 - Teaching theory
 - Working in educational teams
- Area III: Educational process**
 - The curriculum
 - Evaluation
 - Educational research
 - Quality improvement

The 'Completed!' status is shown at the bottom of the sidebar.

The detailed view of 'Teaching skills' shows the domain: 'Teaching skills' and the following text: 'Knows a variety of commonly used teaching methods. Regularly uses common teaching methods effectively. Able to help a learner to develop a PLP.' A 'NEXT >' button is at the bottom right of this view.

At the bottom of the page, there are logos for EURACT and Lifelong Learning Programme, along with a disclaimer: 'This product has been funded with support from the European Commission under the Lifelong Learning Programme. This product reflects the views only of the author, and the Commission cannot be held responsible for any use which may be made of the information contained therein | READ MORE 2013-Y-PL1-LE005-37537'.

The footer contains navigation links: 'ABOUT THE APPRAISAL PROGRAMME | ABOUT THE FRAMEWORK | REQUIREMENTS FOR COMPETENT TEACHERS | REQUIREMENTS FOR EXPERT TEACHER | TYPES OF EVIDENCE'.

The e-portfolio is relatively self-explanatory in what kind of information you must collect for each of the domains. It also shows you how many pieces of evidence you must collect for each domain. You can follow your progression in obtaining the requested documentation by a "meter" in the portfolio (the „meter" is located in the left side of the browser window).

Under each domain the applicant can obtain an overview of the requested type of evidence.

The screenshot displays the user interface of 'The electronic portfolio'. At the top, the logo and title 'The electronic portfolio of evidence of teaching performance' are on the left, and 'HELPDESK | LOGOUT' are on the right. Below the header, there are navigation tabs: 'FORM' (highlighted), 'YOUR PROFILE', and 'ATTACHMENTS'. The user is logged in as 'USER'.

The main content area is divided into two columns. The left column is a vertical navigation menu with a progress indicator. It lists three main areas:

- Area I: Learning environment**
 - Patient safety
 - Reference letter
 - A personal statement
 - Learning and Teaching Resource
 - Personal learning log
 - Management of learning
 - Educational resources
- Area II: Provision of education**
 - Teaching skills
 - Educational supervision and support
 - Management of problems
 - Assessment and feedback
 - Teaching theory
 - Working in educational teams
- Area III: Educational process**
 - The curriculum
 - Evaluation
 - Educational research
 - Quality improvement
- Completed!**

The right column shows the 'Evidence 1/4 A reference letter' form. The title is 'Area I: Learning environment, Domain: Patient safety'. The form instructions are: 'Describe the way you have structured the educational set-up in your own clinical setting so that teaching activities do not diminish patient safety. Discuss your plan with a senior colleague and ask that colleague to provide a reference on your plans to safeguard patients in relation to your work as a teacher.' Below the instructions is a large text input area. At the bottom of the form, it says 'you attached 0 files, need between 0 - 5'. There are three buttons: 'SAVE', 'ATTACH FILES', and 'NEXT >'. A 'Save to pdf' link is visible at the top right of the form area. A vertical 'INFO' bar is located on the right side of the form area.

Please note the "info" bar in the right side of the browser window. This info bar will be beneficial to use in order to understand the "logic" in the online portfolio.

This collection and storing of educational achievements does not have any given time limits - so you can do this at your own pace. Some of the documentation will need involvement of other professionals (e.g. for reference letters and multi source feedback) so the process will take some time – but you can log in and log out without problems and still have your material stored in the e-portfolio.

Please note that files can be uploaded as “attachments”.

When you have uploaded all the required material – and the e-portfolio also shows that your task is finished - you can apply for an appraisal by clicking the button (after discussing your readiness with your mentor).

When all the needed evidence is collected, the applicant can submit it as shown below.

The screenshot displays the user interface of 'The electronic portfolio'. At the top, the logo and name 'The electronic portfolio of evidence of teaching performance' are on the left, and 'HELPDESK' and 'LOGOUT' links are on the right. Below the header is a navigation bar with 'FORM', 'YOUR PROFILE', and 'ATTACHMENTS' tabs. The 'FORM' tab is active. A progress bar on the left lists three areas: 'Area I: Learning environment', 'Area II: Provision of education', and 'Area III: Educational process'. Each area has several domain sub-items. The 'Completed!' label is at the bottom of the progress bar. The main content area shows a dark blue confirmation screen with the text 'The end' and 'Accept the form: Send the form to evaluation'. Below this, there is a paragraph of instructions and a large green 'ACCEPT FORM >' button. The footer contains the EURACT logo, the European Union flag, and the 'Lifelong Learning Programme' logo, along with a funding notice.

The electronic portfolio
of evidence of teaching performance

HELPDESK | LOGOUT

EN | PL

Welcome, **USER**

FORM | YOUR PROFILE | ATTACHMENTS

Save to pdf

Area I: Learning environment

- Domain: Patient safety
- Domain: Management of learning
- Domain: Educational resources

Area II: Provision of education

- Domain: Teaching skills
- Domain: Educational supervision and support
- Domain: Management of problems
- Domain: Assessment and feedback
- Domain: Teaching theory
- Domain: Working in educational teams

Area III: Educational process

- Domain: The curriculum
- Domain: Evaluation
- Domain: Educational research
- Domain: Quality improvement

Completed!

The end

Accept the form:
Send the form to evaluation

if you do not want to change anything in the application - press the button "Accept Form". Once an application is approved, you can not edit it anymore, but you can view the History tab. Only the administrator can unlock the editing - you can send a message via the Helpdesk

ACCEPT FORM >



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D How is the evidence assessed?

The appraisal process is run by:

-  a national educational appraiser if you apply for the competent level.
-  2 international educational appraisers if you apply for the expert level.

The appraisers will be appointed by EURACT. They will use the **“Template for use in the appraisal of portfolios of teaching expertise”** (see EURACT website) for their judgments. The Template describes the criteria for judging each specific piece of evidence. The Template’s aim is to ensure that decisions in the appraisal process are reliable, valid and can be applied in an European context.

E How will the result of the appraisal process be communicated?

The result and appraiser comments will be electronically communicated via the portfolio after the appraisal process has been finished – and the certificate can be downloaded from the portfolio.

If the appraisal process is not successful the applicant will receive the comments and suggestions from the appraiser(s) for improvement – this information will be described in the portfolio.

F Recognition

Successful applicants names will be listed on EURACT’s website and will be publicized by the national EURACT Council member. The EURACT Council member may be able to inform relevant national educational bodies – after request by an applicant.

G How to appeal a negative decision?

If unsuccessful the applicant has an option to change the evidence and resubmit.

If however, you feel that the process was not followed correctly you have the right to appeal. The appeal process is defined – see Appendix No. 2.

Applicants submitting evidence will be expected to conform to professional standards of behaviour whilst participating in the appraisal process and may be disqualified from participating if they are found to have:

- a.** failed to follow the instructions on collecting evidence in the domains chosen;
- b.** copied or attempted to copy evidence from other applicants;
- c.** falsified the results of any data collection submitted;
- d.** misrepresented their status as a teacher in GP/FM in their own country (such misrepresentation might include the nomination of mentors who are not qualified to be recognised as such, or have a conflict of interest e.g. a first degree relative, or personal friend of the applicant).

DEVELOPMENT METHODOLOGY

The whole appraisal system is the main outcome of the international project ***“Continuing Educational Development and Harmonisation of Expert Teachers in General Practice/Family Medicine in Europe through a systematic process of quality improvement”*** supported by EU Leonardo da Vinci Programme (project No. 2013-1-PL1-LEO05-37537). It builds also on the results of the previous project ***“Framework for Continuing Educational Development of Trainers in General Practice/Family Medicine in Europe”***, conducted also within the frames of Leonardo da Vinci Programme (project No. 2010-1-PL1-LEO05-11460). As all project products are interrelated - they were developed in a step-based manner.

Within the first months of the Project, activities were mainly focused on the template development. These included numerous panel discussions with active involvement of international educational experts, literature survey, questionnaire survey among potential participants of the appraisal process as well as diverse evaluation activities.

Finalization of the Template allowed for starting work on technical specification of the electronic portfolio of evidence of teaching performance. Hours of consultation were carried out both within and outside the partnership (i. a. search for similar tools in other disciplines, occupations) aimed at optimizing its technical requirements. After launching demo version - two pilot courses were organized for both the potential applicants and appraisers to test the tool.

One of the most important elements of the appraisal process incorporated into the portfolio functionality is the ‘assessment algorithm’. During the portfolio development process it was changed twice as a result of a feedback from the evaluation activities. Participants of the evaluation activities expressed strong opinion that the initial requirements for participants and ‘pass rules’ proposed by the partners were too rigorous (thus i. a. the number of evidence required in specific domains was limited.)

After finalization of the electronic portfolio work on manuals on how to use it from the perspective of an applicant (handbook for applicants) and an appraiser (handbook for appraisers) was carried out.

ACKNOWLEDGEMENTS

We wish to acknowledge all the persons and organizations, which helped us to complete this important document. We are especially grateful to the Council of EURACT and members of its special task force for their valuable contributions. We also want to thank all project partners, individual experts and participants of the piloting workshops who assisted us with their wisdom and expertise at different phases of the work.

APPENDIXES

Appendix No. 1.

Standard form of reference letter

.....
(title, name)

.....

.....
(affiliation, position)

.....
(telephone)

.....
(e-mail)

.....
(place and date)

TO WHOM IT MAY CONCERN

I the undersigned, hereby certify that (insert here the name of the applicant) has been actively involved in the teaching of general practice/family medicine. I have been able through direct observation to witness the application of his/her educational knowledge, skills and attitudes in the teaching of family medicine. On this basis of these observations I can confirm that he/she has achieved at least the level of a competent teacher in the following domains:

1. Patient safety
2. Management of learning
3. Educational resources
4. Teaching skills
5. Educational supervision and support
6. Management of problems
7. Assessment and feedback
8. Teaching theory
9. Working in educational teams
10. The curriculum
11. Evaluation
12. Educational research
13. Quality improvement (delete the 5 domains for which evidence has been submitted within the expert appraisal process)

as described in the Framework for the Continuing Educational Development of Trainers in General Practice/Family Medicine in Europe.
In case of uncertainty or the need for any further information, please do not hesitate to contact me.

.....
(signature)

Appendix No. 2.

Appeal process

Applicants for the EURACT teacher appraisal programme also have the right to appeal against an adverse decision to the EURACT appraisal task group. Should an applicant be judged to be, not ready yet' he/she is entitled to appeal against that decision to the EURACT appraisal task group under the following circumstances:

It is the opinion of the applicant that:

- a. the appraisal process as described in the programme handbooks was not followed,
- b. the judgement of the application is biased and/or inaccurate,
- c. the appraisers have not considered all the evidence provided,
- d. the applicant has been judged as not to have conformed to professional standards of behaviour and that judgement is incorrect.

Process: If an applicant has been informed by the EURACT task group on appraisal that an applicant appears not to have conformed to professional standards of behaviour whilst participating in the appraisal project he/she will be informed in writing and asked to comment to the task group and the programme administrator within 28 days.

An appeals panel consisting of three members will be appointed by the EURACT task group to review the evidence and decide whether the appeal should be allowed or dismissed. The membership of such an appeal panel will be:

1. A member of EURACT council (chair).
2. An appraiser for the project who has not been involved in the original appraisal decision.
3. An education expert appointed by the applicant concerned, normally the EURACT Council member of the country of the applicant.

The appeal will consider the written evidence provided and any further statements from the applicant. There will be no face-to-face meeting. The panel must make a decision within 3 months of being set up.

If an applicant is appealing against an appraisal judgement he/she should notify the EURACT administrator that he/she wish to appeal, and state the grounds for the appeal. An appeals panel as above should be set up to consider the evidence provided, and decide whether to allow the appeal, or to let the original decision stand. The panel will notify the applicant of their decision and reasons. There will be no further appeal.



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