

Instructions: Portfolio Evaluation

Instructions for Diplomates

Indicate the **ten*** competencies you have chosen for evaluation by checking the blank in front of each corresponding competency on the Portfolio Evaluation tool. You will not assess yourself or be assessed on the remaining competencies listed on the tool.

Use this assessment tool (plus the supporting documentation specified below) to evaluate yourself using the following instructions. Please remember to write your complete name on each page where indicated prior to initiating your self-evaluation. **Section 1** includes personal information, such as a biographical sketch, professional goals, or CV. **Section 2** offers evidence to support the competencies you have selected for self-assessment. **Section 3** includes self scoring on achievement of competencies. **Section 4** entails discussion of your self-evaluation with your supervisor (or colleague if you do not have a supervisor). **Products included in the portfolio should reflect examples of fulfillment of the competencies you have selected for self-assessment.**

Section 1: CV/professional data

Please include a copy of your CV or other professional information that reflects your scope of practice (e.g., goals statement or biographical sketch). This (these) document(s) must accompany the Portfolio Evaluation.

Section 2: Listing of Products Supporting Competencies

In the column labeled “Portfolio Evidence,” for each of the **ten*** competencies you selected for self-assessment please list “products” from your professional activities that offer evidence of fulfillment of the competencies you have selected for self-assessment and attach a hard copy of that product to the evaluation tool. Each competency (indicated as “C#”) is composed of specific performance indicators (indicated as “P#”). It is not necessary to include a product for each performance indicator within a competency; however, it is recommended to address as many performance indicators as possible within a specific competency. Also, products may serve as evidence supporting more than one performance indicator or competency, as appropriate. Please see the following list for examples of activities which may fulfill each competency. *However, potential products offered within this guidance document are for example only and should not be construed as required elements of the portfolio.* Example portfolio products for each competency include:

COMPETENCIES COMMON TO ALL CORE CONTENT AREAS (C1-C7)

C1:

- Text of a speech communicating a public health issue to a target public audience
- Print materials conveying a specific public health message
- Risk assessment of a public health problem, including assessment of target audience’s perception of risk and your response
- Audience evaluation of a speech, town hall meeting, etc.
- Published journal article or submitted manuscript on which you are the primary author addressing a specific public health problem and target audience

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C2:

- Assessment of prioritization of public health issues or programs within your scope of practice and rationale for ranking
- Evaluation of completed project or program
- Evaluation plan for ongoing or planned project or program

C3:

- Description of current applications of health information technology (HIT) within your practice
- Plan for implementation of HIT within your practice
- Product reflecting computer competency

C4:

- Example of proposed legislation, action to change current legislation, or successful implementation/change of legislation
- Written or oral testimony addressing a legislative or regulatory issue
- Action plan for implementation of new or altered legislation

C5:

- Risk assessment of a public health problem, including assessment of target audience's perception of risk
- Example of manner in which you addressed the diversity of your practice population
- Health plan or intervention addressing specific need(s) of target population
- Research proposal to address public health problem within your scope of practice

C6:

- Organizational chart specifying your role/responsibilities
- Stakeholder analysis
- Proposed action plan or description of implementation of action items identified at stakeholder meeting
- Supervisor evaluation

C7:

- Needs assessment conducted in your practice population or organization
- Health plan or intervention addressing specific need(s) of target population
- Evaluation of completed project or program
- Evaluation plan for ongoing or planned project or program

BIostatistics/Epidemiology (C8-C13)

C8:

- Review of existing data sources and support services within your practice community
- Literature review (including epidemiology) of a current public health problem
- Statistical analysis of a data set
- Health plan or intervention addressing specific need(s) of target population, based upon statistical analysis and/or epidemiologic evidence

C9:

- Proposed plan for epidemiologic study
- Results/outcome/evaluation of an epidemiologic study

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C10:

- Description of surveillance system currently in use within your scope of practice
- Proposal of surveillance plan for future implementation
- Outcome of, or action taken based upon, surveillance data
- Evaluation of a surveillance system
- Analysis of data generated by surveillance system

C11:

- Description of data set and data analysis
- Evaluation of limitations of data set

C12:

- Literature review (including epidemiology) of a current public health problem
- Policy recommendation or intervention addressing specific need(s) of target population, based upon epidemiologic evidence
- Evaluation or description of presentation of recommendations to decision-makers or funders

C13:

- Description of design of potential outbreak and/or cluster investigation
- Description of events/results of a previously conducted outbreak and/or cluster investigation
- Description of unusual or notable occurrences of disease, injury or other health conditions in your practice population and method by which you addressed/are addressing/plan to address
- Description of proposed control measure in your practice population
- Description of control measure previously or currently implemented in your practice
- Text of a speech communicating findings of an outbreak and/or cluster investigation
- Press release communicating findings of an outbreak and/or cluster investigation
- Audience evaluation of report of progress/outcome of an outbreak and/or cluster investigation

MANAGEMENT AND ADMINISTRATION (C14-C17)

C14:

- Example of policy implementation/change or policy proposal
- Cost-benefit or cost-effectiveness analysis of policy proposal or intervention
- Documentation supporting policy proposal (evidence base; legal/regulatory requirements)
- Stakeholder analysis

C15:

- Needs assessment of target population
- Plan to address specific health issue or plan, including goals and objectives
- Budget
- Implementation plan
- Marketing plan
- Evaluation of implementation process

C16:

- List of performance measures for program or organization
- Results of organizational Quality Improvement (QI) or Quality Assurance (QA) assessment
- Evaluation of performance measures
- Recommendations for system change based on QI/QA plan and assessment

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C17:

- Organizational chart specifying your role/responsibilities
- Budget development or oversight
- Example of milestone tracking system or work plan
- Explication of relationships with key partners
- Description of human resources (HR) strategies

MEDICAL MANAGEMENT (C18-C21)

C18:

- Design and implementation plan for health promotion, disease prevention, demand management or disease management program
- Design/implementation/evaluation of clinical practice guidelines, QI program, utilization management, case management, or other activity to enhance organizational performance and reduce practice variation
- Evaluation of service delivery through application of techniques, such as process improvement, benchmarking, outcomes assessment, or clinical epidemiology
- Analysis of health care delivery system/reimbursement model on the health of a defined population, patient/payor/provider needs and behaviors or organizational performance
- Example of marketing strategy to promote participation in a service, change patient/provider/organizational behavior or support development of a health care product or service
- Evaluation of the effectiveness, public health necessity, and appropriateness of a product or intervention
- Design or evaluation of a patient satisfaction measure/mechanism
- Evaluation of a patient satisfaction mechanism

C19:

- Use of financial management reports to develop recommendations to enhance organizational effectiveness
- Application of cost-effectiveness analysis, cost-benefit analysis or decision analysis to allocate and manage resources
- Business or financial plan
- Strategic plan
- Analysis of organizational impact of insurance principles/benefits

C20:

- Analysis of management information needs or current system/example of application of medical informatics with your patient population or in your organization
- Evaluation by supervisor/co-worker/reportee
- Example of effective utilization of leadership skills
- Participation in a leadership/management training/negotiation and conflict resolution program

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C21:

- Analysis of an ethical issue within scope of practice
- Identification of and plan for addressing liability issue(s)
- Plan to work with legislative regulatory processes at other levels of governments or with other agencies or other disciplines relevant to public health
- Results of collaboration with other levels of governments or with other agencies or disciplines relevant to public health to solve or mitigate a public health problem

CLINICAL PREVENTIVE MEDICINE (C22-C25)

C22:

- Implementation of screening program
- Evaluation of screening program
- Plan for monitoring and reporting outcomes of screening program

C23:

- Risk assessment of a public health problem
- Description of screening and counseling services
- Plan for development of screening and counseling services
- Immunization plan
- TB control plan

C24:

- Description of community-based intervention
- Evaluation of community-based intervention
- Monitoring system for intervention process or effectiveness
- Community evaluation of safety hazards or opportunities for/barriers to physical activity
- Implementation or evaluation of a community-based or worksite wellness program

C25:

- Identification of key preventable diseases/injuries/conditions in target population
- Plan for addressing one or more key preventable diseases/injuries/conditions in target population
- Example of management of one or more key preventable diseases/injuries/conditions in target population

OCCUPATIONAL AND ENVIRONMENTAL HEALTH (C26-C27)

C26:

- Occupational history collection/documentation tool
- Description of proposed plan for mitigation or elimination of occupational hazard or environmental exposure
- Description of intervention or program for mitigation or elimination of occupational hazard or environmental exposure
- Evaluation of intervention or program for mitigation or elimination of occupational hazard or environmental exposure
- Case report describing (actual or potential) relationship between patient symptoms and occupational/environmental exposure
- Testimony describing occupational hazard or environmental exposure and advocating for mitigation or elimination

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C27:

- Characterization of specific occupational hazard or environmental exposure within a target population
- Literature review on the health effects of an occupational hazard or environmental exposure
- Evaluation of risk reduction plan
- Environmental or occupation assessment for potential occupational hazards or environmental exposure

ACGME GENERAL PHYSICIAN COMPETENCIES (C28-C33)

C28:

- Written feedback from patients, their families, or members of healthcare team
- Management plan for provision of preventive services in a clinical or community setting
- Community intervention design and implementation plan
- Results of chart review documenting screening rates
- Text of a speech communicating a public health issue to a target public audience

C29:

- Development plan for community-based intervention or population screening program
- Scholarly publication or literature review on a topic relevant to scope of practice

C30:

- Description of current applications of HIT within your practice
- Student evaluations from lecture or course
- Health plan or intervention addressing specific need(s) of target population, based upon statistical analysis and/or epidemiologic evidence
- Design/implementation/evaluation of clinical practice guidelines, QI program, utilization management, case management, or other activity to enhance organizational performance and reduce practice variation

C31:

- Text of a speech communicating a public health issue to a target public audience
- Written feedback from patients, their families, or members of healthcare team
- Risk assessment of a public health problem, including assessment of target audience's perception of risk and your response
- Audience evaluation of a speech, town hall meeting, etc.

C32:

- Evidence of participation in professional development course
- Case report from participation on an ethics committee
- Evidence of teaching or participation in course on cultural sensitivity
- Example of way in which you addressed the diversity of your practice population
- Evaluation by supervisor/Co-worker/Reportee

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C33:

- Evidence of participation in advocacy on a specific health issues
- Needs assessment conducted in your practice population or organization
- Evidence of milestone tracking system or work plan
- Design/implementation/evaluation of clinical practice guidelines, QI program, utilization management, case management, or other activity to enhance organizational performance and reduce practice variation
- Evaluation of service delivery through application of techniques, such as process improvement, benchmarking, outcomes assessment, or clinical epidemiology
- Analysis of health care delivery system/reimbursement model on the health of a defined population, patient/payor/provider needs and behaviors or organizational performance

Section 3: Self scoring on achievement of competencies

After completion of the “Portfolio Evidence,” please rate yourself on your achievement of each performance indicator associated with the ten selected competencies in the “Self-Score” column using the following rating system:

- 1** = failed to achieve performance indicator representing competency
- 2** = marginal achievement of performance indicator representing competency
- 3** = adequate achievement of performance indicator representing competency
- 4** = above average achievement of performance indicator representing competency
- 5** = exemplary achievement of performance indicator representing competency

Section 4: Review of Self-Evaluation

After you have completed your self-assessment on the ten selected competencies, please give your completed Portfolio Evaluation (with “products” attached) and a copy of these instructions to your supervisor or another colleague whom you feel can comment knowledgeably on your scope of practice. Ask that person to review your “Portfolio Evidence” and “Self-Score” and add comments in the column labeled “Evaluator’s Comments,” completing the evaluation according to the “Instructions for Evaluators” below.

Request that he/she return the completed Portfolio Evaluation to you within a specified period of time. Please retain your Portfolio Evaluation, as you will need to send your completed evaluation tool and supporting documentation to the American College of Preventive Medicine **after completing the Diplomate Practice Assessment Plan (DPAP) cycle.**

Return to the DPAP to complete the remainder of the Diplomate Practice Assessment Plan.

Instructions for Evaluators:

You have been asked to participate in the practice assessment of a diplomate of the American College of Preventive Medicine. This tool is designed to provide meaningful feedback that the diplomate will use to design and evaluate a practice improvement or professional development plan. He/she will also be performing a self-evaluation using this tool. Thank you for facilitating this physician’s professional growth.

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Please evaluate the diplomate on the **ten*** competencies for which he/she has completed the columns entitled “Portfolio Evidence” and “Self-Score” by reviewing the products specified by the Diplomate as evidence of fulfillment of the selected competencies *and* his/her self-score for each completed performance indicator. In the column labeled “Evaluator’s Comments,” please indicate your agreement with his/her self-assessment, assessment of appropriateness of example products, or other comments, as appropriate. You will not assess him/her on the remaining competencies on the form.

After you have completed your assessment of the diplomate on the ten selected competencies, please return the completed evaluation tool and products to the physician whose practice you have assessed.

Thank you very much for participating in the practice assessment of a diplomate of the American College of Preventive Medicine.

*When the diplomate is completing the re-evaluation of his/her performance, only **one** competency will be selected for assessment.