Peer Observation of Teaching Handbook

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Introduction

Peer observation of teaching enables professional medical educators to:
- connect with their colleagues in collaborative working relationships,
- reflect and gain insight on their instructional skills, and
- engage in public discourse about best teaching practices.

Peer observation may occur as an informal exercise in which faculty members "buddy up" to observe each other teach and discuss what happened during a single teaching encounter, or as a formal assessment that is part of a larger evaluation system. Most often, peer observation occurs as a semi-structured activity in which faculty, with some prior training, are invited to observe a colleague's teaching session. The observer may or may not use a teaching observation form to guide the observation; however, there is always a discussion afterwards to share feedback and exchange ideas about educational strategies, learner engagement, group dynamics, and time management.

This handbook describes the steps a peer observer should follow, based on our experience and review of the literature, to effectively observe a peer teach and to provide meaningful feedback. We believe the goals of any peer observation of teaching experience, whether formal or informal, are the exchange of instructional insights, discussion of pedagogical methods, and the development of collaborative teaching relationships.

Notations:
- For the purposes of this handbook, we define "peer observer" as the individual conducting the teaching observation, and "faculty member" as the individual being observed.

- While our published research has focused on medical lecturing, this handbook is meant to serve as a guide for observation of a variety of teaching activities (from small group discussion to bedside teaching).

Step 1: Clarify expectations:

When a faculty member invites you to conduct a peer observation of his or her teaching, begin by determining the goals for the observation. Clarify that you will conduct a formative assessment of teaching* directed toward areas the faculty member identifies as important and in need of improvement. Be sure to stress that the observation results and discussion will be confidential and provided only to the faculty member being observed. Any written notes or documentation will not be shared with supervisory staff unless the faculty member so chooses.

*A summative assessment is one component of a formal teaching evaluation process, used for academic or promotional purposes. At our institution, summative teaching assessment is separate from what we describe in this handbook. We recommend that prior to summative teaching assessment, a faculty member have at least two formative assessments.

Step 2: Review logistics

Prior to the observation, you should note the exact date, time, and place of the teaching session, as well as where you can meet the faculty member before the session. Schedule enough time to arrive early and stay until the last learner has left. Many teaching interactions happen before and after a session, providing you with further insight into the faculty member's teaching approach.

Take note of the level of learners, the nature of the teaching activity, and the format of the session. You may also want to look at the curriculum, course outline, or any assigned readings. Ask the faculty member what has been taught previously and what will be taught in subsequent sessions (if appropriate) to help you place this session into an educational context.

Although this may seem minor, it is important to determine how the faculty member will introduce you to the learners (if you are not introduced to the learners, they may assume you are observing *them*!)

Finally, ensure that there is adequate time after the teaching session to debrief the experience and provide feedback, or arrange a meeting soon thereafter for this purpose.

Step 3: **Plan the feedback meeting first**

Prior to the session, schedule a time when you will meet to discuss your reflections and feedback with the faculty member. The feedback discussion is an essential component of conducting an observation; therefore, scheduling a feedback meeting should be as high a priority as scheduling the observation. In addition to a face-to-face discussion, it may also be useful for the faculty member to receive written documentation of your observations, ideas, and suggestions. Note that all comments will be kept in strict confidence.

Step 4: **Focus the lens**

Speak with the faculty member before the session to review his/her goals for the teaching encounter. What does the faculty member expect the learners to know, show, or do by the end of the session? Are there specific learning scenarios that he/she has struggled with prior to this session? By identifying specific teaching skills on which you should focus your attention during the observation, you will be able to provide valuable and meaningful feedback to the faculty member after the teaching session.

To help the faculty member identify specific teaching skills and behaviors on which he or she would like you to focus during the teaching encounter, you might start by reviewing a peer teaching observation form. Without a list of teaching behaviors, faculty members often have trouble pinpointing the exact area or skill they would like to improve. There are numerous teaching observation forms published in the medical education literature and available on the Internet. At the end of this handbook, we have included a collection of peer observation of teaching forms that we have created to help guide peer observation at our institution. We encourage you to use and adapt these forms to meet your own peer observation needs. We have also included a peer observation of lecturing assessment form that we previously created, validated, and published.[1]

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[1] Newman LR, Lown BA, Jones RN, Johansson A, Schwartzstein RM. Developing a peer assessment of lecturing instrument: Lessons learned. Academic Medicine. 2009; 84:1104-1110.

Step 5: Conduct the observation

To capture what happens during the teaching session it is best to take copious notes about the learning environment, learner engagement, teaching methods, and management of the session. You might bring a peer observation teaching form with you; however, it is difficult to attend to what is happening in the classroom while considering each item listed on the form. Remember the form's purpose is to guide the observation, not to rate or assess a teaching performance. It is best to review the form ahead of time, bring it with you, and then take notes on its backside. Later, with the faculty member, you can look over the form and your notes, paying particular attention to areas on which the faculty member asked you to focus your attention. When taking notes, it is important to stay focused on the pedagogy rather than the specific topic or content. To this end, pay particular attention to what is happening or being discussed during the teaching encounter rather than taking notes about the topic being presented. It is best to record questions the learners ask, interesting comments, points of confusion, etc. Suggested areas to note are listed below. During the observation try to situate yourself so that you are seated outside of the faculty member's line of sight as this will reduce his or her sense of anxiety about being observed. Do not participate in the session (e.g. answer questions, share comments). If the faculty member should invite your opinion, politely decline.

When conducting the observation, take note of the following:[2, 3]

- The learning environment (does it feel safe? are the learners relaxed?)
- Whether the faculty members states the goal or focus of the session.
- Whether the faculty member appears to know the learners and to direct teaching to their level of training.

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[2] C. Roland Christensen Center for Teaching and Learning, Harvard Business School. Guidelines for effective observation of case instructors. URL: http://www.hbs.edu/teachingandlearningcenter/in-practice/documents/observationguidelines.html

[3] Akerlind GS, Pettigrove MG. Peer Review and Self-Evaluation: A Toolkit Resource Booklet for Improvement of Teaching and Learning. Canberra, Australia: Australian National University's Centre of Educational Development and Academic Methods, 1996.

- How well prepared the faculty member and the learners are for the session, and how much enthusiasm they have for the topic at hand.

- How well organized the faculty member is and if there seems to be a logical sequence to the session.

- The teaching methods and if they seem appropriate for the goals of the session.

- The degree of learner engagement, and if this is encouraged or not.

- How often the faculty member checks the learners' level of understanding or asks for questions from the learners.

- (For discussion group teaching) The flow of discussion – Who are the active participants and who is trying to avoid engagement? Who keeps the discussion going? Are all questions and answers relayed to the faculty member or do participants address each other? Which participants are listened to when they speak? Which are ignored? How is silence handled?

- How learners' emotions are handled (e.g. disagreement, boredom, frustration, curiosity).

- The level of questions the faculty member poses to the learners (e.g. lower order factual-type questions or higher-order analytic and evaluative-type questions)

- How long the faculty member pauses for learners to respond and how he or she handles responses (e.g. encourages further elaboration, points out misunderstandings, accepts any response provided, doesn't allow time for response, or answers own question)

- How effectively the faculty member's body language, eye contact, voice, and movement support the learning process and demonstrate enthusiasm for the topic. Does the faculty member look mainly at his or her notes, computer or the learners? Does he or she focus on particular learners or parts of the audience?

- How well the faculty member's voice can be heard by the learners.

- How the session is concluded and how major points are summarized. Is a handout or readings provided? If appropriate, is there a reference to upcoming educational sessions, assignments, or activities?

- What occurs after the teaching encounter? Are there informal discussions among the students or do several learners approach the faculty member to help clarify their understanding of the material?

Step 6: Meet soon after the teaching session

Feedback is most useful when given at the earliest opportunity so that reflections on the faculty member's teaching are not forgotten or become vague. Sharing your observations of the faculty's teaching performance should be done in person– it will have less impact if delivered over the phone or in some other indirect way. While sending an email or written summary of your observations is useful after a sit-down discussion, sending an email by itself is not a valid means of having a shared *conversation* about teaching practices. If you conducted the observation with another observer, take time to compare notes and determine who will take the lead during the debriefing.

Immediately following the teaching encounter, encourage the faculty member to write down his/her own reflections about the session. Consider these self-assessment questions to help stimulate reflections:

- Please name two main teaching points you hoped to convey to the participants. Describe the technique(s) you used to emphasize the importance of these points.
- Please identify one question or issue you would most like to discuss during our debriefing.
- Describe at which point during the teaching session you felt the participants were most engaged. At which point were they least engaged? Why?
- If you were asked to teach this session again, describe one thing you would do exactly the same and one thing you might change.

Step 7: Debrief the teaching session

Select a private place to debrief the session. Explain that you enjoyed observing the faculty member teach and would like to share feedback and reflections about the session. Start by inviting the faculty member to share his or her own reflections. Use the questions listed above under Step 6 to guide the discussion. Be sure to address: 1) the specific areas on which the faculty

member asked you to focus during the observation; 2) the faculty member's instructional strengths and ways these may be leveraged while teaching; 3) opportunities for growth, addressing specifically those areas that would yield the greatest improvement in teaching effectiveness; 4) key moments or turning points in the session; 5) general, yet constructive recommendations for future teaching experiences; 6) specific techniques or skills that you witnessed during the session and hope to utilize in your *own* teaching – thank the faculty member for sharing those with you!

If applicable, review the section(s) of the peer observation of teaching form that address the feedback sought by the faculty.

Step 8: Give feedback that is useful (a few pointers)

In your role as peer observer you have the advantage of stepping back to notice, and later share, critical teaching moments with the faculty member. Your goal is to "mirror" back to the faculty member what impressed you about the learner engagement, group dynamic, and the instructional and process issues that you were able to see from your vantage point. Be sure to highlight the positive elements, build confidence, and focus on the specific areas that the faculty member asked for feedback. Approach the feedback experience as a mutual exploration of best teaching practices.

In giving feedback:
-   Structure your feedback so that you are sharing reflections rather than giving advice. By sharing information, you give the faculty member the option of deciding for him- or herself the most appropriate changes or improvements to make.[4]

-   Begin on a positive note. Identify one teaching skill or behavior that the faculty member did well. By doing so, faculty members will relax and be able to hear ways to improve. Starting with something positive also gives the faculty member a teaching behavior to continue to do, rather than hearing only about skills that need to be improved.[5]

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[4] Kurtz S, Silverman J, Draper J. Analyzing interviews and giving feedback in experiential teaching sessions. In: Teaching and Learning Communication Skills in Medicine, 2nd ed. United Kingdom: Radcliff Publishing, 2005.

[5] DeLima Thomas J, Arnold RM. Giving feedback. Jour of Palliative Med. 2011;14:233-239.

- Ask the faculty member to describe the experience and relay what he/she felt went well and areas to improve. If he/she is extremely self-critical or conversely feels everything went well, ask, "At what point in the session did you feel the learners were most engaged?" and "At what point did you sense the learners losing interest?" Or "What questions were going through your head while you were teaching?"

- Focus attention on what the faculty member asked for your feedback about prior to the session, and then mirror back what you saw. For example, "You mentioned that you were interested in managing the time of the session better. I noticed that the session went 10 minutes over. What do you think might have happened?"

- Avoid judgments and stick to observed behavior. Instead of, "You really know your students," try, "I noticed how you greeted the medical students by their first names and even asked about their patients." Instead of, "You need to give the residents a chance to speak" try, "I noticed that after asking a question, you immediately answered it yourself."

- Be specific as possible. Instead of "You really include your learners!" try "I noticed how you engaged the medical student by allowing her to listen to the patient's heart and then to describe the heart murmur."

- Ask the faculty member to explore and consider alternatives for areas that need improvement. For example, use the ask-tell-ask model, "Did you notice that the student spent most of the time texting in the corner of the patient's room? The student appeared bored and disengaged. What are ways to include the student during a patient encounter?"

- Provide direct quotes or concrete examples of behavior. For example, "When you said to the student, 'Good insight. What other factors might be at play here?' I noticed that the student was able to expand her thinking."

- Identify only things that the faculty member can change or influence. Try to provide solutions to teaching challenges you identified. For instance, instead of "You really rushed through a lot of topics at the end of the session," try "I noticed at the end of the session, we covered several topics before the students left. I might have asked the students which topic they wanted to cover in the time remaining."

- Notice the faculty member's receptivity and understanding of your feedback. Individuals often have emotional responses to feedback,

especially about situations in which they feel most publicly exposed (such as their teaching performance). By and large, faculty members will express gratitude for the feedback you provide because teaching is an area that is rarely observed. Moreover, since you will focus on the skills that the faculty member identified prior to the observation, you should find the debriefing experience to be more of a conversation about teaching rather than a delivery of your judgment. Invite the faculty member to share reactions to your observations. If he or she disagrees with your feedback, discuss a mutually acceptable solution.

- o "I might not have enough information about the team dynamics, but it appeared to me that the senior resident felt the need to dominate the discussion. Did you sense that as well?"
- o "What has worked for me is to ask the learners what they are most interested in learning about the topic. Have you tried this technique?"
- o "I'm concerned that the medical student might have felt left out of the conversation. What are some ways we can think of to engage the student during rounds?"

- One feedback method that has been used successfully in simulation-based training is called the advocacy-inquiry approach.[6] In this method, the primary goal in giving feedback is to establish a sense of advocacy, respect, and problem solving. The aim is to encourage the faculty member to examine his/her teaching behaviors and, if necessary, to consider alternative approaches. Advocacy statements are observations, whereas inquiries are questions. For example, you might say to the faculty member, "I noticed the students whispered a lot to each other during your presentation" (advocacy). "I'm curious, how did you interpret their whispering?" (inquiry). The advocacy-inquiry approach directly states your perspective, and demonstrates your intent to elicit your colleague's viewpoint. For example, he/she might respond, "To me, when I see the students whispering, I feel they are engaged and curious." This insight provides you with an opportunity to suggest an alternative approach. "I agree the students appear curious, but let's think of a way they can feel comfortable expressing themselves directly to you or to the group."

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[6] Rudolph JW, et al. There's no such thing as "non-judgmental" debriefing: A theory and method for debriefing with good judgment. Simulation in Healthcare 2006;1:49-55.

- Invite faculty members to summarize what insights they gained during your discussion and identify the areas of improvement they want to pursue. Publicly stating how they intend to achieve their learning goals can enhance a sense of commitment to these goals and improve the chance of behavioral change.

- If possible, arrange a follow-up observation or discussion. Observing a faculty member during a subsequent session will extend your "teaching" conversation and ensure the lasting, positive educational outcomes your feedback is meant to achieve.

Step 9: Avoid common feedback pitfalls

It is important to remember that the peer observation process may feel challenging or threatening for many faculty members as it involves opening themselves up to review and potential criticism. Given that both being observed and receiving feedback may be novel experiences for faculty members, it is best to avoid these common pitfalls when delivering peer feedback:

- Launching immediately into what you would have done in the same situation.

- Focusing solely on identifying and describing "problems" observed.

- Providing an overwhelming list of what to do and what not to do in future sessions.

- Leading a one-way conversation without asking for the faculty member's reflections or thoughts.

- Comparing the faculty member with another instructor.

- Pointing out skills that need further improvement, without providing suggestions or solutions on how these areas may be developed.

Step 10: Reap the benefits of providing feedback

Conducting an observation can be an extremely positive experience, for you and the faculty member, and can result in the following teaching development outcomes:

- o <u>Increases confidence in teaching</u>
  Many faculty members have never received feedback on their instruction and may display some uncertainty about their teaching ability. Receiving

positive feedback and developing a teaching partnership offers faculty an increased sense of confidence, insight on educational practices, and an increased likelihood of experimenting with novel teaching methods.

o Reinforces best teaching methods
Faculty may not realize what they are doing well – even if it has positive effects on their learners. You can help identify such behaviors and encourage continued use of these techniques.

o Solves recurring dilemmas
Most faculty members are able to identify teaching dilemmas, yet are unable to solve these problems on their own. Establishing a peer observation partnership allows faculty colleagues to strategize how to remedy common teaching quandaries.

o Prompts self-reflection
A reward for observing a faculty member is the opportunity to consider your own teaching from a new perspective. Try experimenting with novel approaches you observed that led to positive learning gains. Sharing such observations with the faculty member reinforces the bilateral nature of the process.

o Starts a conversation
One powerful, positive outcome of a structured peer observation system is that it engages faculty members in a discussion about teaching as its own discipline. By discussing teaching strategies, innovations, and dilemmas publicly, others can engage in and contribute to the conversation.

o Establishes teaching partnerships
In conducting a teaching observation, you are likely to begin to reflect on your own teaching. For example you might ask yourself, "How do I handle distractions?" or "Do I pause after the questions I pose?" Inviting the faculty member you have just observed to provide feedback on your teaching allows further teaching skill development and a continued conversation about best educational practices. Faculty who arrange reciprocal peer observation partnerships engage in a feedback exchange that soon becomes part of their routine practice.

PEER OBSERVATION OF TEACHING REFERENCES

BOOKS

Akerlind GS, Pettigrove MG. Peer Review and Self-Evaluation: A Toolkit Resource Booklet for Improvement of Teaching and Learning. Canberra, Australia: CEDAM, Australian National University, 1996.

This booklet is intended for teachers to become familiar with a peer-evaluation of teaching. Readers are encouraged to explore the peer-evaluation methods, tailor them to their needs, and weave them into a personal or collective tradition of peer-evaluation practices.

Arreola R. Developing a Comprehensive Faculty Evaluation System (2nd ed.) Bolton, MA: Anker Publishing, 2000.

This is a handbook on faculty evaluation that provides proven models for developing and implementing a faculty evaluation system including peer assessment of teaching.

Braskamp LA, Ory JC. Assessing Faculty Work: Enhancing Individual and Instructional Performance. San Francisco, CA: Jossey-Bass, 1994.

This is a practical resource for fostering and assessing faculty achievements in all aspects of their work, including teaching, research, practice, and citizenship. The authors show that the assessment process can and must be tied to faculty development, and explain how collegial activity, including peer mentoring and review, and continuous improvement are important to strong performance.

Brookfield, Stephen. Becoming a Critically Reflective Teacher. San Francisco, CA: Jossey Bass, 1995.

This book describes what critical reflection is and why it is so important. Brookfield describes how teachers can reframe their teaching by viewing their practice through four distinctive lenses: their autobiographies as teachers and learners, their students' eyes, their colleagues' perceptions, and theoretical literature.

Centra J. Reflective Faculty Evaluation: Evaluating Teaching and Determining Faculty Effectiveness. San Francisco, CA: Jossey Bass, 1993.

This book presents the latest findings and approaches to faculty evaluation, including peer mentoring and review, both for formative and summative purposes, and addresses current issues. Centra discusses a need for the following: a definition of scholarship that includes teaching and public service; better use of and guidelines for student evaluations; better ways to involve colleagues in evaluating and improving teaching; proper use of self-reports and portfolios; varieties of effective teaching; and legal considerations in faculty evaluation.

Chism NVN. Peer Review of Teaching: A Sourcebook. Bolton, MA: Anker. 1999.

This sourcebook provides a conceptual framework for the use of peer review, a listing of the tasks involved in setting up a peer review system, and practical suggestions and resources that can be adapted by faculty users.

Hutchings P. Making Teaching Community Property: A Menu for Peer Collaboration and Peer Review. Washington, DC: American Association for Higher Education, 1996.

Teaching is a matter not simply of method and technique, but of selecting, organizing, and transforming one's field so that it can be engaged and understood at a deep level by students. Each chapter in this volume focuses on a particular strategy for peer review or peer collaboration around teaching and learning.

Hutchings P (ed). From Idea to Prototype: The Peer Review of Teaching: A Project Workbook. Washington, DC: American Association for Higher Education, 1995.

This project workbook provides a set of materials, tasks, "think pieces," and examples that faculty can duplicate and use to develop their own parallel projects in peer review. The project workbook is intended for faculty who are interested in serving as professional colleagues to each other in the improvement and evaluation of teaching.

Schőn, Donald. Educating the Reflective Practitioner. San Francisco, CA: Jossey Bass, 1987.

The author argues that professional education should be centered on enhancing the practitioner's ability for "reflection-in-action" that is, learning by doing and developing the ability for continued learning and problem solving throughout the professional's career.

Westberg, J and Jason, H. Fostering Reflection and Providing Feedback: Helping Others Learn from Experience. New York, NY: Springer, 2001.

This book describes two underlying principles of becoming a thoughtful practitioner: reflection and feedback. The authors offer strategies to assist students in developing the attitudes and skills to think about and assess their work, consciously and consistently.

ARTICLES and MONOGRAPHS

Beckman TJ, Lee MC, Rohren CH, Pankratz, VS. Evaluating an instrument for the peer review of inpatient teaching. Medical Teacher 2003;25(2):131-135.

Berk RA, Naumann PL, Appling SE. Beyond student ratings: Peer observation of classroom and clinical teaching. International Journal of Nursing Scholarship 2004;1(1):1-26.

Brinko KT, The practice of giving feedback to improve teaching: What is effective? Journal of Higher Education 1993;64:574-593.

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Leamon MH, Servis MH, Canning RD, Searles RC. A comparison of student evaluations and faculty peer evaluations of faculty lecturers. Acad Med 1999;74(10):s22-s24.

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Rudolph JW, et al. There's no such thing as "non-judgemental" debriefing: A theory and method for debriefing with good judgement. Simulation in Healthcare 2006;1:49-55.

Snell L, et al. A review of the evaluation of clinical teaching: New perspectives and challenges. Med Ed 2000;34(10):862-870.

University of Nottingham, Staff and Educational Development Unit. Peer Observation. URL: http://www.nottingham.ac.uk/sedu/peerobs/index.php

MedEdPORTAL RESOURCES

Blanco M, Capello C, Gusic M, McCormack W, Hafler J. Peer Feedback Tool for Lectures & Small Group Teaching. MedEdPORTAL; 2011. Available from: www.mededportal.org/publication/8416

Burke C, Fulton T, Chen H. Workshop in a Box: Project Management for Faculty and Learner Development. MedEdPORTAL; 2011. Available from: www.mededportal.org/publication/8304

Jahangiri L, Mucciolo T. Presentation Skills Assessment Tools. MedEdPORTAL; 2010. Available from: www.mededportal.org/publication/7930

Zenni E , Hageman H, Hafler J, Gusic M, Peer Feedback Tool for Clinical Teaching. MedEdPORTAL; 2011. Available from: www.mededportal.org/publication/8560

Appendices*
(Peer Observation of Teaching Forms)

*Attached are several peer observation of teaching forms that we have developed for common clinical teaching activities. The forms are based on our review of the literature and discussions with local experts in medical education. Except for the final instrument (the *Peer Assessment of Medical Lecturing*[7]), we have not measured the validity or reliability of the observation forms; rather we offer them here as guides to observing particular teaching encounters.

We would like to thank the following medical educators for their expertise and suggestions in crafting the peer observation forms:

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- Patricia Kritek, M.D.
- C. Christopher Smith, M.D.
- Charles Vollmer, M.D.

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[7] Newman LR, Lown BA, Jones RN, Johansson A, Schwartzstein RM. Developing a peer assessment of lecturing instrument: Lessons learned. Academic Medicine. 2009; 84:1104-1110.

GLOBAL* PEER OBSERVATION OF TEACHING FORM

Observer: **Faculty Member:**	Observations/Notes/Quotes
Learning Environment	
Gets to know the learners	
Identifies the learners' needs	
Demonstrates enthusiasm for teaching	
Builds on learners' knowledge and skill-base	
Models and encourages "thinking out loud"	
Encourages learners to voice uncertainty	
Teaches to the range of learner levels	
Learner Engagement	
Fosters active learning by asking open-ended, analytic, or evaluative questions	
Encourages learners to share information and experiences	
Elicits learner' thought process	
Encourages learners to ask questions and discuss issues	
Encourages learners to pursue and critically appraise the literature	
Session Management	
Communicates clear goals and agenda for session	
Modifies session plans in response to learners' needs	
Organizes the session appropriately	
Keeps track of time	
Uses chalkboard or AV effectively	
Teaching Methods	
Reasons through issues of medical uncertainty and provides necessary direction	
Challenges learners' assumptions and explores their reasoning	
Highlights key teaching points	
Discusses complex issues in concise and logical manner	
Emphasizes understanding of concepts	
Models and encourages critical thinking	
Cites examples from the literature	
Concludes session with summary of key teaching points	

Additional Comments:

*The intent of this "global" form is that it may be used for various and diverse teaching venues.

PEER OBSERVATION OF BEDSIDE TEACHING FORM

Observer: Faculty Member:	*Observations/Notes/Quotes*
Learning Environment	
Gets to know the learners	
Identifies the learners' needs	
Demonstrates enthusiasm for teaching	
Builds on learners' knowledge and skill-base	
Models and encourages "thinking out loud"	
Encourages learners to voice uncertainty	
Teaches to the range of learners	
Demonstrates respect for learners	
Encourages team leadership and decision making	
Learner Engagement	
Fosters active learning by asking open-ended, analytic, or evaluative questions	
Encourages learners to share information and experiences	
Elicits learner's thought process	
Encourages learners to ask questions and discuss issues	
Ensures that all learners can see/hear key physical findings	
Asks learners to discuss differential diagnosis; probes for supporting evidence	
Encourages learners to pursue and critically appraise the literature	
Balance of Patient and Learner Needs	
Models sensitive and respectful attitude toward patients	
Engages patient as a teacher of the team	
At the bedside demonstrates history-taking and PE skills	
Models respect for allied professionals	
Addresses the social, ethical, and cost-effective care aspects of medicine	
Teaching Methods	
Reasons through issues of medical uncertainty and provides necessary direction	
Challenges learners' assumptions and explores their reasoning	
Highlights key teaching points	
Discusses complex issues in concise and logical manner	
Emphasizes understanding of concepts	
Models and encourages critical thinking	
Cites examples from the literature	
Makes explicit plan for further learning	
Summarizes key points or asks learners to summarize	

Additional Comments:

PEER OBSERVATION OF SMALL GROUP TEACHING FORM

Observer: Faculty Member:	*Observations/Notes/Quotes*
Learning Environment	
Gets to know the learners and identifies their needs	
Demonstrates enthusiasm for teaching	
Builds on learners' knowledge and skill-base	
Encourages learners to voice uncertainty, ask questions	
Addresses range of learner levels and needs	
Learner Engagement	
Probes and encourages learners to share information and experiences	
Is comfortable with silence	
Asks learners to make connections between what they already know and what they are discussing	
Encourages learners to pursue and critically appraise the literature	
Solicits and provides learner feedback	
Session Management	
Communicates learning goals for the discussion	
Uses resources/cases/materials that promote critical thinking and problem solving	
Organizes the session appropriately	
Helps the group transition to new topics or tasks	
Keeps track of time	
Teaching Method	
Assumes appropriate role as facilitator (coach, consultant, instructor)	
Models and encourages critical thinking	
Uses questions to promote discussion and probe learners' thought processes	
Highlights key teaching points and emphasizes understanding of concepts	
Discusses relevance of discussion topic to clinical experiences	
Summarizes key points and encourages learners to share what they have learned	

Additional Comments:

PEER OBSERVATION OF AMBULATORY/OUTPATIENT TEACHING FORM

Observer: Faculty Member:	*Observation/Notes/Quotes:*
Learning Environment	
Demonstrates interest in/enthusiasm for teaching	
Gets to know the learner and assesses his/her learning needs and experiences	
Demonstrates respect for the learner	
Encourages learner to ask questions and voice uncertainty	
Models "thinking out loud"	
Learner Engagement	
Elicits and discusses learner's thought processes (e.g. through questioning and problem solving)	
Facilitates appropriate learner autonomy	
Asks learner to investigate a relevant clinical topic and report back	
Solicits and provides timely feedback	
Balance of Patient and Learner Needs	
Models respect for patients and staff	
Helps learner to manage his/her time	
Addresses social, ethical, and economic aspects of medicine	
Discusses rationale/evidence for clinical decision making	
Teaching Method	
Asks learner to observe important doctor-patient interactions and discuss together afterwards	
Observes learner interact with patients and provides feedback	
Demonstrates or observes physical diagnosis skills	
Asks learner to discuss differential diagnosis, assessment, plan -- probes for supporting evidence	
Reasons through issues of medical uncertainty and provides necessary direction	
Cites evidence from the medical literature	
Makes explicit plan for future learning	

Additional Comments:

PEER OBSERVATION OF OPERATING ROOM TEACHING

Observer: Faculty Member:	*Observation/Notes/Quotes:*
Learning Environment	
Creates a supportive learning environment	
Gets to know the trainee (asks which skills he/she wants to perform/practice during the operation)	
Delineates expectations for each case	
Encourages learner to ask questions and voice any uncertainty	
Allows for graduated trainee autonomy	
Models and encourages "thinking out loud"	
Balances Patient and Learner Needs	
Models respectful attitude toward the patient	
Models respect for allied professionals	
Addresses the social, ethical, and cost-effective care aspects of medicine	
Discusses rationale/evidence for operative decision making	
Preoperative Assessment	
Discusses cases pre-operatively with trainee	
Asks trainee to describe "steps" of operation	
Addresses potential intraoperative pitfalls	
Reviews salient films	
Intraoperative Teaching Method	
Engages in discussion of retraction techniques	
Demonstrates technical steps	
Lets trainee perform critical technical steps	
Provides immediate feedback to the trainee	
Provides illustrations	
Refers to literature to support decisions	
Discusses topics relevant to the case	
Provides clear verbal instructions	
Demonstrates tolerance and patience w/trainee	
Encourages collaboration in decision making	
Post-Operative Debriefing	
Takes time to discuss case post-operatively	
Provides specific examples of what the trainee did well and what he/she needs to improve	
Makes explicit plan for further learning	

Additional Comments:

Peer Assessment of Medical Lecturing Instrument

Name of lecturer: _____ _____ **Topic of presentation:** _____ **Date:** _____

Audience (UME/GME/CME) Size (<, >, = 100)   Name of observer: _____

Please rate your own content expertise in this topic: Excellent   Very Good   Good   Fair   Poor

Criteria for Effective Lecturing		Excellent Demonstration of Criteria 5	Very Good Demonstration of Criteria 4	Adequate Demonstration of Criteria 3	Poor Demonstration of Criteria 2	Does not Demonstrate Criteria 1	Rating or Unable to Assess (U/A)	COMMENTS
1 *Goals*	Clearly states goals of the talk	During introduction, communicates purpose of the presentation. For example may provide an overview of content, present expected learning outcomes, pose rhetorical/challenging questions to be answered, etc.		Communicates the goals, but description is limited in scope (e.g. *only* provides topics to be covered or the format of talk)		Does not provide overview nor communicate goals of talk		
2 *Importance of Topic*	Communicates or demonstrates importance of the lecture's topic(s)	Clearly explains the topic and subtopics' relevance, context, applicability, and/or the significance to the audience (e.g. presents compelling information, case, or data; uses a "hook")		Refers to the importance of topic, but provides limited description of why learners need to know the material		Does not communicate or describe why the topic is of importance		
3 *Organization*	Presents material in a clear, organized fashion	Uses an explicit, organized framework so that the presentation flows logically (e.g. articulates a structure and sequence to the talk, frames subtopics, links concepts)		Presentation has some organization, but limited in structure, linkage, and/or sequence		Does not present material in a clear, organized fashion		
4 *Enthusiasm*	Shows enthusiasm for topic	Demonstrates keen enthusiasm for topic through voice, eye contact, energy, movement and/or body language (e.g. varies pitch, inflection, tempo and volume; gestures to emphasize importance)		Shows some enthusiasm for topic, but limited in display		Does not show enthusiasm for the topic		

Criteria for Effective Lecturing		Excellent Demonstration of Criteria 5	Very Good Demon-stration of Criteria 4	Adequate Demonstration of Criteria 3	Poor Demon-stration of Criteria 2	Does not Demonstrate Criteria 1	Rating or Unable to Assess (U/A)	COMMENTS
5 *Command of Topic*	Demonstrates command of the subject matter	Demonstrates strong understanding of subject matter (e.g. cites the literature, refers to overarching subject area, draws upon personal experiences, speaks to advances or current controversies in the field, and/or provides informative answers to questions, etc.)		Demonstrates some command of subject, but breadth of understanding is limited (e.g. unable elaborate with greater detail or information)		Does not demonstrate a command of subject matter		
6 *Explanations*	Explains and summarizes key concepts	Defines new terms/principles, synthesizes information (e.g. identifies important points; uses examples, analogies, metaphors; thinks out loud)		Explains some key concepts, or provides vague explanations		Does not explain or summarize key concepts		
7 *Audience Interaction*	Encourages appropriate audience interaction	Stimulates active participation (e.g. makes eye contact, solicits comments and questions, polls the audience, uses deliberate silence, poses open-ended questions, invites learners to interact with each other; manages flow of discussion)		Encourages some interaction or uses less effective strategies (close-ended questions, little wait time, often turns back to audience and reads from slides)		Does not engage or encourage interaction (e.g. reads all slides without looking at audience, defers questions and does not answer them)		
8 *Monitors Audience's Understanding*	Monitors audience's understanding of material and responds accordingly	At appropriate intervals assesses and responds to audience's understanding of material (e.g. asks probing questions or polls audience; asks if material is clear, then tailors response by rephrasing or providing alternative examples; adjusts the pace of lecture to accommodate learners)		Pays some attention to the audience's understanding of topic, but tailoring of response is limited		Does not pay attention to the audience's understanding of material		
9 *Audio and/or Visual Aids*	Audio and/or visual aids reinforce the content effectively	Appropriately chooses and designs instructional material to reinforce key points, demonstrate relevance of material, or stimulate thought		Some of the audio and/or visual aids reinforce content, or material is less than effective		Audio and/or visual aids do not reinforce content		

Criteria for Effective Lecturing		Excellent Demonstration of Criteria 5	Very Good Demon-stration of Criteria 4	Adequate Demonstration of Criteria 3	Poor Demon-stration of Criteria 2	Does not Demonstrate Criteria 1	Rating or Unable to Assess (U/A)	COMMENTS
10 *Mechanics of Communica-tion*	Voice is clear and audiovisuals are audible/ legible	Sensitive to the setting and tailors audio and visual aids so all can see and hear (e.g. checks if audience can hear/see material; talks to audience not to blackboard, laptop, or screen; visual material is well organized, text is legible, and graphics are clear)		At times voice is unclear or audiovisuals are inaudible/illegible		Voice is unclear and audiovisuals are inaudible/ illegible.		
11 *Conclusion*	Provides a conclusion to the talk	Concludes presentation by summarizing main points. If appropriate venue, invites/responds to questions and open to hearing learners' perspectives/opinions		Provides summary of talk, but limited in scope. Invites few questions and/or provides limited or ambiguous responses		Fails to summarize information and does not solicit questions/ opinions		

Overall, how would you rate this lecture (*please circle*):

 ___4__ **Excellent**   ___3__ **Very Good**   ___2__**Adequate**   ___1__ **Poor**

Additional comments: