Executive Committee on Assessment and MD Portfolio (ECAMP)

Strategic Plan:

Competency based Curriculum and Assessment System

Contents discussed at CCEP July 20, 2011

Final report August 8, 2011

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## Reference glossary

- CCEP – Committee on Curriculum and Educational Policy
- CLE – Collaborative Learning Environment
- FPC – Foundations of Patient Care course
- ICSC – Integrated Curriculum Steering Committee
- OME – Office of Medical Education
- RaDME – Research and Development in Medical Education
- TEL – Technology-Enabled Learning
- UME – Undergraduate Medicine Education
- USMLE – US Medical Licensing Exam
ECAMP strategic plan -FINAL report

ECAMP Charge
- Consult with Undergraduate Medical Education on implementation concerns in 2010-2011 including the continuing concern of faculty development
- Work with extant committees and task forces to develop a three-year strategic plan for MD Portfolio that includes plans for assessment of clinical studies, summative student assessment and use in promotions processes, and continuing faculty development
- Bring the strategic plan to CCEP for feedback in March and approval in June such that it will be implemented with 2011-2012 as Year 1 of 3

Mission, Vision, and Guiding Principles

Mission
To graduate medical students who demonstrate competence in all six competency domains.

Vision
A comprehensive, longitudinal, developmentally sequenced competency based curriculum and assessment system that fosters excellence through self-directed learning.

Guiding Principles
- Promote student reflection on their goals, work, and progress
- Foster self-directed learning
- Provide students opportunities to demonstrate competence
- Help students identify gaps in their abilities and develop effective learning plans to address those gaps
- Help students develop further in areas of strength and interest
Background
This report builds on prior work described in the 2006 report of the Committee on Student Assessment (COSA) and the 2007 report of the electronic Portfolio Implementation Committee (ePIC). Both groups highlighted the need for a change in culture from a traditional assessment system that valued a limited number of assessment methodologies that were teacher-centered, to an assessment system that reflected the learner-centered, integrated curriculum at UCSF. COSA proposed a competency based assessment system and the development of a portfolio; ePIC extended that work to describe the essential elements of a robust electronic portfolio implementation plan, including a multi-year process with involvement of wide-ranging stakeholders and education of faculty, learners, staff and others about the value and use of the portfolio. Both COSA and ePIC emphasized the importance of longitudinal advising and mentoring to guide students in their development of competence, reflection on performance, and identification of learning goals and needs.

COSA report:
http://medschool.ucsf.edu/curriculum/development/cosa/PDFs/COSA%20FinalReport.pdf

ePIC report:
http://medschool.ucsf.edu/gme/pdf/ePIC_ExSummary.pdf

Summary of ECAMP recommendations
In considering what progress has been made since 2007 on these initiatives, and a gap analysis comparing the current assessment system to the visions articulated in COSA and ePIC, ECAMP found the need to focus first on two critical areas: (1) longitudinal advising and mentoring and (2) a structure for overseeing the assessment of each competency domain across the curriculum in the form of the competency directors.

This report builds on the ECAMP preliminary report to CCEP on March 16, 2011; at that time, the CCEP supported the group’s work and encouraged continuation of the planning in four strategic areas: Competency Coaches, Competency Directors, MD Portfolio, and Critical Reflection. ECAMP has proceeded accordingly and advanced the recommendations in the four strategic areas, in addition to discussing recommendations for next steps in the leadership and oversight structure for student assessment.

Upon considering the next steps for MD Portfolio and Critical Reflection, it has since become clear that the needs for these two areas overlap and can be consolidated into one recommendation for a revised MD curriculum and
assessment system with portfolio and reflection activities that focus on student-directed learning as a more central value.

ECAMP presents the following three recommendations:

1. **Competency coaches:** Each student should be assigned a longitudinal competency coach. The Foundations of Patient Care (FPC) small group facilitators should serve this role.

2. **Competency directors:** Competency directors in each competency domain should be appointed to have oversight of the curriculum, formative and summative assessment (including required curriculum interventions), and portfolio activities related to each competency domain. Each competency director would work with the course and clerkship directors and other faculty who implement these activities, and collaborate with other competency directors across competency domains.

3. **Curricular shift toward student-directed learning:** CCEP should oversee, through the Integrated Curriculum Steering Committee (ICSC), refinements in the curriculum that support students’ development of skills essential for life-long learning. With this greater emphasis on the Practice Based Learning and Improvement (PBLI) competency domain, the MD Portfolio process should continue to facilitate the development of individual learning plans. Finally, the portfolio process should advance to use in promotions decisions for students entering in the fall of 2012. The School of Medicine should prioritize engagement of faculty and students with a portfolio process that supports these mechanisms for student-directed learning and competency based advancement.

### 1. Advising: Competency coaches

**Objective:** Implement an advising system in which FPC small group facilitators serve as competency coaches.
- Implement for MS1s in 2011-12.
- Advisory college mentors will support and help guide the work of the competency coaches.

**Objective:** Train competency coaches to (1) provide guidance and feedback to students as they reflect on evidence of their learning and competence in the six competency domains, (2) identify gaps in ability and performance, and (3) plan and undertake effective ways to address those gaps.
- Implement faculty development for competency coaches, including competency based education principles, feedback skills, MD portfolio, and assessment of student portfolios and reflections.
- **Timeline:**
  - Recruit FPC small group facilitators who can serve in the additional
role of competency coaches for MS1s entering in fall 2011.
  o Plan and implement faculty development for competency coaches 2011-12.
To see how these timelines fit in with concurrent efforts, please see Table 1 at end of this document.

2. Competency Directors

Objective: Appoint competency directors to have longitudinal oversight of four-year formative and summative assessment (including required curriculum interventions) in the specified domain(s). In the subsequent text of this plan, the term “assessment activities” is intended to include formative and summative assessment and required curriculum interventions.
  • Appoint one to two competency directors per domain for two-year terms
  • , one-year renewable.
  • Competency directors will work with the course and clerkship directors and other faculty who participate in the implementation of the above activities.

Objective: Competency directors map the competency domains to current curricular activities and assessments activities. This process will involve developing a template for the map that incorporates milestones and curricular and assessment activities over the four-year curriculum. Mapping completed by June 2012.

Objective: Competency directors work with course and clerkship directors to expand the opportunities to incorporate competencies into learning and assessment activities. For projected timeline of these activities please see Table 1.
  • Work with FPC leadership, Essential Core course directors, and clerkship directors to expand the use of competency language in syllabi, lectures, small groups, and exams continually across curriculum.
  • Work with competency coaches and course and clerkship directors to advance students’ understanding of the competencies and milestones.
  • Coordinate with course and clerkship directors to align learning and assessment activities with MD Portfolio.
  • Work with course and clerkship directors and leadership to use competency language in Screening and Promotions Committees’ communications.
  • Work with course and clerkship directors to select and refine assessment activities that align with students’ prior and upcoming
curricular activities and assessments; for instance, through meetings with course directors well in advance (eg, six months) of a block.

- Develop a plan for students to incorporate portfolio evidence that could arise outside of courses and clerkships.
- Work with Essential Core courses to pilot new or refine existing assessment activities that reflect the competency domains and milestones to achieve competency based assessment. The goal for 2011-2012 is to facilitate the development of at least four new competency based assessment activities that fill identified gaps, with encouragement of activities that cross courses or clerkships.

**Objective:** Competency directors serve on a Competency Director Leadership Group.

- Competency directors begin monthly Competency Director Leadership Group meetings by August, 2011, chaired by the Director of Student Assessment.
- Establish feasible plan to interface with course and clerkship directors via representation at steering and course committees.

**Objective:** Competency directors develop a system for longitudinal assessment in the domains, a process for assessing competence, and procedures for reporting individual and summary performance data to students and their competency coaches.

- Competency maps, review of student ability to reflect on competence and develop learning plans, and student performance data should inform a determination of each student’s achievement of competence in each competency domain.
- Competency directors develop a template for reporting of student competence in each competency domain each year of the four-year curriculum that will be used by students and their competency coaches to inform students’ individualized learning plans.

**Objective:** Work with the Office of Medical Education to guide implementation of faculty development about competencies targeted to course and clerkship leadership and frontline teachers. Faculty development will be important for the creation of meaningful curricular and assessment activities related to competencies. Timelines and initial responsibilities are listed in Table 1.

### 3. Curricular shift toward student-directed learning

In addition to the creation and appointment of competency coaches and competency directors, ECAMP recommends the following steps to achieve a curricular shift toward student-directed learning over the next three years. CCEP should oversee, through the ICSC, refinements in the curriculum that support students' development of competence and achievement of skills essential for life-
long learning. With this greater emphasis on the Practice Based Learning and Improvement (PBLI) competency domain, the MD Portfolio process should respond to evaluation data to improve its facilitation of the development of individual learning plans. Finally, the portfolio process should inform promotions decisions for students beginning with the class entering in the fall of 2012. The 2011-12 year will lay the groundwork through establishment of the Competency Coach system within FPC, selection and development of a summative portfolio review process, and enhancement of the self-directed learning infrastructure as described in this report.

Objective: Promote Practice Based Learning and Improvement (PBLI) in the first-year curriculum

Students must acquire skills in reflection, learning planning, and self-improvement throughout the four-year curriculum. Specifically, ECAMP recommends the following actions:

- The PBLI Competency Director will lead an evaluation of existing curriculum on self-assessment, feedback skills, and critical reflection for MS1s based on student feedback and focus groups with FPC and course leadership and competency directors.
- The PBLI Competency Director will work with leadership, course directors, and other key faculty and student leaders to revise and/or develop a curriculum to teach students the skills that facilitate self-directed learning (self-assessment, seeking and incorporating feedback, critical reflection) in TLCS using immediately relevant curricular or extracurricular experiences through practice coupled with timely feedback. The plans below will be responsive to the emergent analysis of evaluation data, and other curriculum changes initiated by the new Deans.
- Students learn critical reflection and learning planning in the fall of first year through didactics and an exercise on Interpersonal and Communication skills (ICS) coupled with peer feedback and group discussion in FPC.
- Students apply these skills to reflect and self-assess on progress toward milestones in all six competency domains and formulate plans, midway through year 1 and at the end of year 1, supported by feedback from the competency coaches (CCs).

Students will be required to complete these activities to pass FPC, and to complete required course assessments in other Essential Core courses. In 2011-12, first-year students who complete these activities but at a level below expected competency will receive a pass for FPC and be referred to a faculty expert who is willing to support and guide the student to reach milestones in the relevant competency domain. For the entering class of 2012 and beyond, students who do not demonstrate minimum competence will not pass FPC until they remediate and demonstrate competence.

- The curriculum for years 2, 3, and 4 will be developed as the class entering in 2011 (class of 2015) moves into years 2, 3, and 4 respectively.
The current proposal is to focus PBLI in year 2 on USMLE prep, and to focus PBLI in years 3 and 4 on other areas, such as QI projects.

- The PBLI Competency Director (PBLI CD) will collaborate with FPC and other faculty to develop plans to address students' concerns about the safety and purpose of sharing self-assessments with faculty. Relevant information will be shared on the FPC website (CLE).
- The PBLI CD will partner with curriculum committees and course directors to identify/create dedicated time within the integrated curriculum for meaningful self-directed learning activities.
- The curriculum committees, the Research and Development in Medical Education (RaDME) unit, and FPC will provide ongoing faculty development for course and clerkship directors as well as competency coaches regarding the value and function of the portfolio process in the development of our students as life-long learners.
- The Office of Medical Education will invest in faculty development to ensure all teaching faculty have an understanding of the SOM's vision for competency based curriculum and student assessment, and that faculty understand their own role in supporting students' development as life-long learners through a portfolio process.

**Objective:** Improve MD Portfolio facilitation of learning planning.

For the past two years, Undergraduate Medical Education (UME) has worked with the Office of Medical Education (OME) to facilitate the MD Portfolio process between Advisory College mentors and MS1s and MS2s. Based on student feedback, the process will relocate with the introduction of competency coaching by FPC small group facilitators. Coaches will need to be represented on the Competency Council (see Leadership Structure below) that must continue to improve the learning planning capacities of the MD Portfolio. ECAMP recommends that

- UME partner with Advisory College Mentors, Technology Enabled Learning (TEL), FPC, and RaDME to train competency coaches to help learners select materials that demonstrate students' current competence in the six domains and to guide students’ learning planning (see Competency Coaches above)
- CCEP oversee, through the steering and course committees, the provision of dedicated time for students to accomplish portfolio requirements.
- The OME/Evaluations unit analyzes the data collected from mentors and students to help the Competency Council prioritize ways of improving the learning planning process.

**Objective:** Integrate MD Portfolio into Promotions and MSPE processes.

MD Portfolio thus far has remained a learning and planning tool. Advisory College Mentors have reported to Screening and Promotions only whether or not students have completed the required work in MD Portfolio. Information about a
student’s readiness to proceed to the next level of training has remained between the student and their mentor. ECAMP recommends that CCEP charge the Competency Council (defined below) with the planning needed to implement a presentation application of MD Portfolio for use in promotions decisions for the entering class of 2012 that will advance into years 2, 3, and 4 as those students advance through medical school. The MD Portfolio summative assessment information would similarly be used for this class of students to summarize students’ performance in the Medical Student Performance Evaluation (MSPE) (i.e. beginning in fall of 2015 for the class of 2016). By then, the competency directors will have been able to support the creation of ample opportunities for students to demonstrate competence in all six domains, the PBLI curriculum will have been refined well enough to give students firm skill sets in critically assessing their performance, and competency coaches will have solidified their skills in guiding students in that process. ECAMP recommends that:

- CCEP charge the Competency Council (defined below) with collaborating with competency coaches and leadership to define how the portfolio can support reporting of student competence in each competency domain each year of the four-year curriculum that could be used by Screening and Promotions committees and for reporting on performance in the MSPE.
- CCEP use the 2012-13 school year to initiate a requirement that students consult with coaches in the creation and sharing of portfolio pages for the Screening and Promotions Committee for consideration for promotion to the next block, clerkship, or year in training.
- By 2014-15, clerkships will need to report student performance using competency language. This timeline indicates that clerkships will need to begin incorporating new assessments and competency language prior to 2014 in preparation.
- By 2015, create the interface between the MD Portfolio and the MSPE to be included in the MSPE for the class of 2016. Creation of this plan by 2012-13 would be preferable to allow students to anticipate the format and content of their individual MSPEs.

Timeline: The curricular changes will be closely informed by the work of the competency directors and interaction with course and clerkship directors (see Table 1).

Leadership structure for student assessment and MD Portfolio

The ECAMP recommendations are being delivered at a time of transition at UCSF, with new leadership by the Vice Dean and Associate Dean for Curriculum to begin their service shortly. Thus this is an opportune time to implement change and generate interest and enthusiasm in improving and aligning students’ learning and assessment experience. The recommendations from the 2011 working meeting, which served a similar function to the annual curriculum retreat, included proposals for leadership restructuring. Specifically, Dr. Loeser
presented to CCEP a model for the formation of a Competency Council. This Council would be well positioned to advance the recommendations above, particularly those related to MD Portfolio.

The Competency Council could include representation from student assessment, the Competency Directors Leadership Group, the Practice-Based Learning and Improvement Competency Director, Competency Coaches, Technology Enabled Learning, career decision-making/advising, program assessment, and the UME office. This group would serve an oversight role, perhaps under the ICSC, and be ultimately responsible for ensuring that assessment of competencies and use of MD Portfolio occur in a cohesive, meaningful way across the curriculum.
**Table 1. Projected timeline and ownership* of ECAMP recommendations.**

*Ownership indicated for simplicity and main group to spearhead effort. We expect many of the tasks will require close collaboration between all of the stakeholders.*

<table>
<thead>
<tr>
<th>CCEP/ICSC</th>
<th>2011-2012</th>
<th>2012-2013</th>
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<tr>
<td></td>
<td>1. CCEP charges steering and course committees with providing dedicated time for competency based assessment activities, including time for students to complete portfolio requirements and for coaches to provide individualized, timely feedback.</td>
<td>2. Oversee grading policy changes to reflect competency based assessment.</td>
<td>3. Request annual reporting from Competency Council to evaluate if new structure with coaches and competency directors is effective or if resources need to be allocated differently.</td>
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<td>Request that the Competency Council collaborate with competency coaches and leadership to define how the portfolio can support reporting of student competence in each competency domain each year of the 4-year curriculum in a way that could be used by Screening and Promotions Committees and for reporting on performance in the MSPE.</td>
<td>Review suggestions generated and guide/endorse implementation.</td>
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### Competency Directors

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<th>2011-2012</th>
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<tr>
<td>Work with FPC leadership, Essential Core course directors and clerkship directors to expand use of competency language in syllabi, lectures, small groups, exams, course evaluations, and screening communications continually across curriculum.</td>
<td>1. Address (fix) gaps and redundancies in competency assessment (with course and clerkship directors via steering and course committees).</td>
<td>1. Review and improve competency assessment.</td>
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<tr>
<td>1. Map current assessments and remediation opportunities completed June 2012.</td>
<td>2. Identify gaps and redundancies in competency assessment and recommend improvements. Initial report by July 2012.</td>
<td>2. Implement reporting of achievement of competence in each competency domain in MSPE by fall 2014 (for class of 2015).</td>
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<tr>
<td>2. Identify gaps and redundancies in competency assessment and recommend improvements. Initial report by July 2012.</td>
<td>3. In partnership with other stakeholders, design competency based promotion structure for promotion decisions and for inclusion in the MSPE, beginning with the class entering in fall 2012.</td>
<td>3. Review successes and deficiencies in 2012-2013 faculty development and modify as needed. Prepare faculty development for clerkship faculty to use at faculty meetings and/or online modules.</td>
</tr>
<tr>
<td>3. In partnership with other stakeholders, design competency based promotion structure for promotion decisions and for inclusion in the MSPE, beginning with the class entering in fall 2012.</td>
<td>4. Develop plan for overseeing assessment activities.</td>
<td>4. Continue addition of new assessment opportunities in courses and clerkships.</td>
</tr>
<tr>
<td>4. Develop plan for overseeing assessment activities.</td>
<td>5. Work with course and clerkship directors to identify faculty development needs for course/clerkship and steering committees.</td>
<td>5. Expand and plan addition of new assessment opportunities in courses and clerkships.</td>
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<td>5. Work with course and clerkship directors to identify faculty development needs for course/clerkship and steering committees.</td>
<td>6. Implement or refine four “new” assessments to fill identified gaps.</td>
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</tbody>
</table>
1. Evaluate and adapt projects. Expansion of pilot to whole class, to more competency domains, interprofessional teams, etc.
2. Competency Council and ICSC assess annually how opportunities are meeting objectives of allowing students to generate useful evidence, and how the process supports the students' advancement in the competency domains.
3. Experiment with implementing portfolio creation/review packets
4. Implement assessment in critical reflection at end of year 1.

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<tr>
<th>PBLI director</th>
<th>2011-2012</th>
<th>2012-2013</th>
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<tbody>
<tr>
<td>1. Assess existing curriculum on self-assessment, feedback skills, and critical reflection for MS1s based on student feedback and focus groups with FPC and course leadership and competency stewards.</td>
<td>1. Implementation of pilot curricular projects that consist of reflective activities and will serve as a backbone for self-assessment and sustain life-long and self-directed learning. Use portfolio to support students’ learning and progress.</td>
<td>1. Evaluate and adapt projects. Expansion of pilot to whole class, to more competency domains, interprofessional teams, etc.</td>
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<tr>
<td>2. Plan to improve curriculum to foster skills for self-directed learning and relevance to learner for incoming MS1s. Plan:</td>
<td>2. Competency directors and course directors continue review and report on new opportunities to ICSC.</td>
<td>2. Competency Council and ICSC assess annually how opportunities are meeting objectives of allowing students to generate useful evidence, and how the process supports the students’ advancement in the competency domains.</td>
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<tr>
<td>• MS1 will be taught critical reflection</td>
<td>3. Collect, review, and incorporate suggestions from competency coaches.</td>
<td>3. Experiment with implementing portfolio creation/review packets</td>
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<td>• Specifics of timing and feedback structure will be developed in collaboration with FPC coaches, FPC leadership, and student input.</td>
<td>4. Expand and improve pilots.</td>
<td>4. Implement assessment in critical reflection at end of year 1.</td>
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<td>3. Work with competency directors to develop longitudinal group projects that students will conduct. Identify sustainable models for faculty to provide timely, individualized feedback.</td>
<td>5. Consider methods for assessing competence in critical reflection by end of year 1 and next steps for those are not yet at competence in PBLI domain.</td>
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<td>4. Propose pilot of group projects and mentoring solutions to ICSC</td>
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### Competency Coaches

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<th>2011-2012</th>
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<tbody>
<tr>
<td>1. Learn MD Portfolio process, critical reflection, and self-assessment</td>
<td>1. Monitor for emergent best practices and help teach new coaches.</td>
<td>Work closely with PBLI director to implement end of year 1 assessment of</td>
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<td>skills and learn how to provide feedback on student progress toward</td>
<td>2. Work closely with PBLI director to provide input in curricular changes</td>
<td>critical reflection.</td>
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<td>milestones as shown in portfolio pages.</td>
<td>focused on self-directed learning.</td>
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<td>2. Provide feedback on pages mid-year 1 and end of year 1</td>
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<td>3. Provide frequent reports to Competency Council on challenges and best</td>
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<td>practices and inform development/refinement of rubrics based on</td>
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<td>experiences in 2011-2012.</td>
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### Competency Director Leadership Group

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<tr>
<th>2011-2012</th>
<th>2012-2013</th>
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<tbody>
<tr>
<td>1. Identify student membership</td>
<td>Revisit and revise procedures as committee structures evolve, annually.</td>
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<tr>
<td>2. Competency directors work with committee chairs to establish feasible</td>
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<td>plan to interface with course and clerkship directors via representation</td>
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<td>at steering and course committees.</td>
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<td>3. Initial plan by December 2011.Revisit and revise procedures as</td>
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<td>committee structures evolve, annually beginning by September 2012.</td>
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<td>Competency Council (as defined above: FPC competency coaches, Competency Directors, UME, TEL, Assessment, etc.)</td>
<td>2011-2012</td>
<td>2012-2013</td>
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<tr>
<td>1. Identify student members.</td>
<td>1. Develop clear plan for ongoing oversight of portfolio activities, including person(s) responsible.</td>
<td>1. Annually review vision and purpose of MD Portfolio.</td>
</tr>
<tr>
<td>2. Develop clear plan for ongoing oversight of portfolio activities, including person(s) responsible.</td>
<td>5. Seek out emergent competency coaching best practices to enrich each subsequent year.</td>
<td>6. Collaborate with CCEP and reporting committees to develop and disseminate grading policy to reflect competency based assessment, building on work by the Clinical Assessment and Grading Task Force.</td>
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<tr>
<td>3. Annually review vision and purpose of MD Portfolio.</td>
<td>Define how portfolio can support reporting of student competence in each competency domain each year of the four-year curriculum that could be used by Screening and Promotions Committee and for reporting on performance in MSPE, and implement use of portfolio in promotions starting with entering class of 2012 (class of 2016).</td>
<td>Plan process for inclusion of MD Portfolio in MSPE process to be implemented with MSPEs in 2015 (class of 2016).</td>
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<td>4. Recommend communications strategies for all stakeholders.</td>
<td>Annual evaluation and report to inform curricular and faculty development improvements.</td>
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