

## **Quality Portfolio**

### **Template and Instructions**

#### A. General Definitions:

Medical quality is the degree to which health care systems, services, and supplies for individuals and populations increase the likelihood of positive health outcomes.

Clinical quality improvement (QI) is an interdisciplinary process designed to raise standards in the delivery of preventive, diagnostic, therapeutic, and rehabilitative measures in order to maintain, restore, and improve health outcomes of individuals and populations.

#### B. Introduction to the Quality Portfolio:

Any activity which meets the above definition should be included in your Quality Portfolio. The Quality Portfolio is intended to formally organize and document activities in quality improvement. The design and function of the Quality Portfolio should parallel that of the Educator's Portfolio which is widely used as an effective tool to document achievement and success in education.

The Quality Portfolio is intended to highlight activities in quality in a cohesive manner but may include activities and accomplishments more closely related to patient safety. Individuals and institutions can determine the degree to which patient safety should be included in the Quality Portfolio based on local definitions and standards. Likewise, the Quality Portfolio is meant to be a guide and fill a present void in documentation of productivity. The Quality Portfolio is not intended to replace, but rather augment the current methods of documentation of success and we encourage local adaptation and implementation.

Based on prior experience and expectations for promotion, institutions may decide to delete, edit, modify, or re-order the categories in the Quality Portfolio outlined below. This framework is meant to serve as a guide for the construction of a portfolio which may more effectively document achievement and efforts in quality.

#### C. Quality Portfolio Framework:

The structured framework for the Quality Portfolio has six distinct categories:

1. QI Leadership / Administrative Activity
2. QI Project Activity
3. QI Education / Curricula
4. QI Research
5. QI Honors / Awards / Recognition
6. QI Training / Certification.

Additionally, the portfolio begins with a brief narrative to outline broadly an individual's role in and approach to Quality Improvement. The portfolio concludes with an appendix to include pertinent or supporting information not otherwise contained in the portfolio.

Many details included in the Quality Portfolio will be included in other areas in a standard CV. Much like the Educator's Portfolio, capturing and documenting different domains in Quality Improvement may provide a better perspective on your work in this area (for example, a faculty member will document publications in medical education in the Educator's Portfolio and in a separate Research/Publications section.)

#### D. Detailed Instructions for the Quality Portfolio:

##### 1. FACULTY NARRATIVE

Provide a reflective summary or personal statement describing broadly your involvement in Quality Improvement (QI). The faculty narrative should include general principles or approaches to quality improvement which have been effective and which will guide your future efforts (e.g. multi-disciplinary approach, rapid cycle change, etc.). The narrative should comment on your philosophy, successes, challenges, future directions, and goals in terms of quality improvement.  
(Length 1-2 paragraphs)

##### 2. QI LEADERSHIP / ADMINISTRATIVE ACTIVITY

Successful quality improvement requires strong and focused leadership. Please list your involvement in QI leadership roles. This may include assignments as committee chair or broader QI administrative roles (e.g. Director of Quality for a Division/Department, etc). For each role please provide:

- 1) Leadership / Administrative Title
- 2) Roles and Responsibilities (1-2 lines)

In addition, please include the names and contact information of 3 individuals who can comment on your leadership skills and contributions. These should be listed in the "Professional References" section of the template.

### 3. QI PROJECT ACTIVITY

Please describe your activity in quality improvement projects. Note, projects listed in this category may be local to your institution, regional (for example, part of a hospital collaborative), or national. In general, document a description of the activities as well as the quantity and quality of the work. Specifically, detail the following for each activity:

- 1) Project Title (committee name, project name, etc.)
- 2) Project Timeframe
- 3) Estimated time commitment (in hours per month and duration of the project)
- 4) Project Description/Goals (1-2 line summary of the project goal(s))
- 5) Role/contributions (1-2 line summary of your role; eg Chair, committee member, specific duties)
- 6) Other Project Members (physicians, nurses, therapists, etc.)
- 7) Project outcomes/results (describe how project effectiveness was measured and provide results if available. Results can be qualitative or quantitative).
- 8) Dissemination of project (have any aspect of the project been disseminated either locally, regionally, or nationally?).

### 4. QI EDUCATION ACTIVITY

While you may document your specific teaching activities and curriculum development in other areas, teaching quality improvement to trainees, colleagues, and other healthcare workers can help to improve the overall quality of care. Please document all educational activities related to quality improvement in the categories listed below. Direct teaching may include lectures, small group sessions, panels, CME, etc. Curriculum or instructional design should include courses directed, new QI educational initiatives, preparation of instructional materials, etc.

#### Direct Teaching

- 1) Teaching activity/class title
- 2) Year/month
- 3) Time Commitment (hours per month)
- 4) Description of the class (1-3 line about the course goals, format, and your teaching role)
- 5) Number & description of learners
- 6) Evaluation of QI Educational activity (provide numerical scores compared to other similar activities or a historical average if possible; do not include student/learner comments)

#### Curriculum Development (if applicable)

- 1) Name and educational activity
- 2) Year/month
- 3) Time Commitment (hours per month)
- 3) Your role/contributions to the curricula
- 4) Description of the activity (in a paragraph, outline the goals, format, structure, etc. of the activity)
- 5) Number of learners impacted

6) Evaluation of Curriculum/QI Educational Activity (include numerical values compared to other similar activities or historical average).

7) Dissemination:

#### 5. QI RESEARCH / SCHOLARSHIP

Candidates achieving distinction in this category are generating new knowledge and having an impact on quality improvement regionally or nationally. The central activities of quality improvement research/scholarship are:

- publication and presentations of peer-reviewed work regionally/nationally
- receipt of grants or contracts based on peer review of written proposals
- creation of enduring educational materials that are adopted beyond your own institution

Please document your research and scholarship in quality improvement, including evidence of broader impact if applicable. Include all publications (peer-reviewed and otherwise), abstracts, invited presentations, role as a peer-reviewer for a quality-related publication, as well as any grants or extramural funding in quality improvement. You may wish to include a paragraph summary description of your QI scholarship activities to outline their focus and broader impact.

#### 6. QI AWARDS / HONORS / RECOGNITION

Frequently, work in quality improvement will be recognized with awards and honors. Please list those here including the following:

- 1) Award/honor name
- 2) Awarding organization
- 3) Month/Year
- 4) Criteria for selection (1-2 lines)

In addition, quality improvement efforts may be recognized in less formal ways, with letters from supervisors, executives, or others invested in improving the quality of care. Please list these letters in this section and then attach them in the appendix.

#### 7. QI TRAINING / CERTIFICATION

Please include any additional training you may have in Quality Improvement (e.g. Society of Hospital Medicine Leadership Academy, IHI Seminars or Conferences, Lean, etc.)

#### PROFESSIONAL REFERENCES

#### APPENDIX

Please include additional materials here. Consider including the following: qualitative evidence of QI project activity success, learner evaluations of QI teaching or curriculum development, and letters or unsolicited feedback about your participation in QI activities.