*Peer Observation of Teaching*

*Handbook*

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**10 STEPS:**

**Step 1: Clarify expectations**:

**Step 2: Review logistics**

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

**Step 4**: **Focus the lens**

**Step 5: Conduct the observation**

**Step 6: Meet soon after the teaching session**

**Step 7: Debrief the teaching session**

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

**Step 9: Avoid common feedback pitfalls**

**Step 10: Reap the benefits of providing feedback**

**10 STEPS: Details**

**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.

**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.

Take note of the level of learners, the nature of the teaching activity, and the format of the session.

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. 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. Are there specific learning scenarios that he/she has struggled with prior to this 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.

**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. It is best to review the peer observation form ahead of time, bring it with you, and then take notes on its backside. Pay particular attention to what is happening or being discussed during the teaching encounter rather than taking notes about the topic being presented. 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:

* 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.
* 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.
* 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.
* 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.

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!

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

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.
* Begin on a positive note. Identify one teaching skill or behavior that the faculty member did well. Starting with something positive also gives the faculty member a teaching behavior to continue to do.
* 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.
* 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. Invite the faculty member to share reactions to your observations. If he or she disagrees with your feedback, discuss a mutually acceptable solution.
  + - “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?”
    - “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?”
    - “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. 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).
        + Invite faculty members to summarize what insights they gained during your discussion and identify the areas of improvement they want to pursue.
        + 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 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**

* Increases confidence in teaching
* Reinforces best teaching methods
* Solves recurring dilemmas
* Prompts self-reflection
* Starts a conversation
* Establishes teaching partnerships

**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 |  |

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| Discusses complex issues in concise and logical manner |  |
| Emphasizes understanding of concepts |  |
| Models and encourages critical thinking |  |
| Cites examples from the literature |  |

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| 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**

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| **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**

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| **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**

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| **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 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**

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| **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** |
| 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 |  |  |

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| **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 |  |  |

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| **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:**