



SCHOOL OF  
MEDICINE

CONTINUOUS  
PROFESSIONAL LEARNING

## Peer Observation in Support of Effective Teaching (POSET)

POSET  
Training  
for  
Observers

POSET is a process for obtaining confidential, formative peer feedback on teaching and for two colleagues to learn about teaching through conversation about an observed teaching experience.



Pre-  
Observation  
Meeting

Observation

Post-  
Observation  
Meeting

POSET  
Self-  
Reflection  
and  
Feedback

Educators pursuing the Achievement in Medical Education Program (AMEP) must complete POSET as both an observer and an observee.

CPL receives only the “Self-Reflection and Feedback” forms from both observer and observee as a record of the POSET participation and as CPL program evaluation data.

POSET Guidelines and forms are available through CPL at <http://goto.unm.edu/poset>

## Peer Observation in Support of Effective Teaching (POSET)

### What is POSET?

POSET is a process for obtaining formative peer feedback on teaching and for two colleagues to learn about teaching through conversation about an observed teaching experience. The nature of the observed teaching and learning session and all feedback and conversations between the observer and observee are confidential; only participation and input on participants' experience with the POSET process are reported to CPL.

### Is POSET required for SOM educators?

POSET is open to all educators (faculty, residents, staff, post-docs, and students with teaching roles) on a voluntary basis. Participation in POSET, as both an observer and an observee, is necessary for completing the Achievement in Medical Education Program (AMEP).

### Does any peer observation qualify as participating in POSET?

To assure application of best practices in peer observation of teaching and to maximize the learning impact of the experience, all POSET observers participants must (1) attend, one time, a 90-minute workshop on the POSET process (see CPL website for offerings or request one for your department), and (2) observers *and* observees complete feedback forms for each observation and submit them to CPL ([hsc-CPL@salud.unm.edu](mailto:hsc-CPL@salud.unm.edu)).

### Why have peer observation of teaching?

Peer observation is widely recognized as an essential part of professional growth as a teacher. When we teach, we are commonly unaware of many of our actions, or the actions and reactions of learners, that are readily recognized by an objective observer as either enhancing or impeding the learning process. Feedback and suggestions from a respected, trusted peer are important for adjusting teaching behaviors to improve learning and to augment existing exemplar behaviors. Observers also gain knowledge and skill from watching and thinking about how another teacher instructs learners. Acknowledging to your learners that an observer is present makes you a role model for soliciting feedback as a desirable aspect of professional growth.

### When should I request an observation?

If you have never been observed, or have never observed others teach in a structured way, then you are encouraged to take advantage of this opportunity at any time. Observations can be most effective when you are relatively new to a particular course or rotation and desire an independent check on how you are doing. You may also want to request an observation if you have received other feedback from learners, peers, house staff, or department leadership regarding your teaching that concerns you. Follow-up observations are encouraged, particularly when you receive feedback during an initial POSET session about behaviors that you desire to adjust. Observations will be most helpful when you feel confident about what you are planning to do in a learning session and are not encouraged on the first occasion when you plan to do something very different from your past experience. Some educators plan for observations after striving to implement new instructional ideas learned at CPL workshops (<http://goto.unm.edu/cpl-workshops>).

### Who should I request to observe me?

To qualify as a completed POSET observation, your chosen observer must have completed the POSET training workshop. Those who have completed the workshop are encouraged to sign up with CPL to be an observer. So, a good place to start in selecting an observer is to request a list from CPL ([hsc-cpl@salud.unm.edu](mailto:hsc-cpl@salud.unm.edu)). If you complete the training workshop, please consider adding yourself to the CPL observer list so that you can benefit from observing other faculty and they will then benefit from your feedback. Sometimes, faculty peers wish to provide reciprocal observations for one another; that is an encouraged practice and you may also wish to attend the POSET training workshop together. Although you may want a colleague in your department to conduct the observation because they are familiar with the content you are teaching, also consider the benefits of an observer from outside of your department who, by not being as engaged with the content, will more likely focus on the teaching and learning processes that are taking place.

### How should I decide what to have the observer see?

Although an observee will likely pay attention to all aspects of the learning session, it is advisable to select no more than five specific aspects for focused attention. These focused behaviors may be the ones that you and the observer agree are most essential for the particular teaching circumstance, or they may be behaviors for which you desire preferential feedback because these are elements that you are specifically working to improve. You are encouraged to consult the *Teaching Behaviors Menu for Peer Observation of Teaching* that is provided on the POSET webpage if you are seeking ideas and examples for what to include as priorities in your observation.

### Are there resources or reference materials available to me regarding effective teaching practices?

CPL is developing resources for educators as School of Medicine. To learn what is currently available, click [here](http://goto.unm.edu/cpl-jitl) (<http://goto.unm.edu/cpl-jitl>). All of the information in this packet is available from the [POSET](http://goto.unm.edu/poset) webpage (<http://goto.unm.edu/poset>). You are also encouraged to request specific information or a consultation from CPL by emailing us at [hsc-cpl@salud.unm.edu](mailto:hsc-cpl@salud.unm.edu). In addition, CPL offers workshops throughout the year; see information at <https://goto.unm.edu/cpl-educate>.

# Peer Observation in Support of Effective Teaching

## Observer<sup>1</sup> Guidelines

### A. Initial meeting with faculty member who has asked to be observed (observee)

1. Introduce the purpose of the observation activity – why it will be useful to both of you, and thank the observee for requesting a peer observation.
2. During this meeting you are primarily a listener seeking to determine what the observee wishes to learn from the observation and why. Resist the temptation to offer advice on teaching approaches until after making the actual observation so that you can point to actual teaching behaviors of the observee rather than infer what those might be or present too much information about how you teach before the observation.
3. Have the observee reflect on prior experience of being observed while teaching (e.g., What was helpful? What was not? What does s/he need in order to maximize the opportunity to learn about how s/he teaches via a peer review process? What concerns does s/he have about the process?)
4. Discuss logistics about the learning session – when, where, and who will be there
5. “What am I going to see?” Ask directly about what the instructor plans to do for the observed learning session
6. Ask how the observed instruction fits into the course/block/rotation; e.g., information that students know, background reading or activities that the learners completed prior to the session
7. Review and discuss the format of the observation form
8. Empower the observee to choose what to observe by selecting behaviors to include on the observation form; include discussion of why these choices were made (i.e., learning issues for the observee). Recommend selection of no more than 6 (optimally 4-5) behaviors in order to focus the attention of the observer and usefulness to the observee; the “Teaching Behaviors Menu for Peer Observation of Teaching” and example forms may help to generate ideas but behaviors *do not* need to be selected from the menu.
9. Schedule the time and location for the debrief meeting following the observation
10. Reminder that the comments resulting from the observation and debrief are confidential; only participation and feedback on the process are reported to CPL.

### B. During the observation

1. Minimize disruption: Arrive early to the instructional site and, remain through the entire learning session until learners are dismissed/class is adjourned or until an appropriate break that has been agreed on with the observee.

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<sup>1</sup> To be considered applicable for an Achievement in Medical Education Program (AMEP) certificate pathway (a promotion requirement for faculty hired as of 9/1/2015), POSET observations must be conducted by Observers who have completed POSET training through CPL.

2. Do not use your cell phone, tablet, or computer during the session in order to avoid distracting the learners or instructor
3. Do not participate in the learning sessions or offer suggestions to the instructor during the session in front of students
4. Make sure students understand that the faculty member, not the students, is being observed
5. Observe the session with the observee's selected behavior and learning issues particularly in mind
6. Pay attention to how learners are behaving and responding to instruction or interacting with the instructor in addition to the teacher's behavior
7. Be sure to make note of strategies/behaviors that were particularly effective, and ones you might utilize in your own teaching
8. You are encouraged to use the observation form to guide your documentation

### C. Debrief – Giving feedback and planning for next steps

1. Ask for the observee's impressions of the session: **“How do you think the session went?”**
  - Listen only; make no comments; ask questions only where necessary to understand the response
2. Follow with use of the Harvard Feedback Model (observe/advocate/inquire) to debrief
  - Give observations – **“I noticed ...”** (*observe*), **“I think ....”** (*advocate* - based on evidence, experience), **“I wonder what you were intending ....”** (*inquire* - explore their framework for doing something differently than you would have expected)
3. After delivering the feedback, ask the observee to reflect on changes s/he will consider making and why?
4. Share your own learning from this experience: What you will take away from the process as an observer
5. Share resources for on-going teaching professional development as appropriate
6. Remind observee to complete the *POSET Self Reflection and Feedback Form* and send a copy to CPL (recorded for completion of expectations for the Achievement in Medical Education Program [AMEP] and for CPL program evaluation)

### D. Complete the *POSET Self-Reflection and Feedback Form* and submit a copy to CPL

1. Completing the form serves to
  - Consolidate your learning from the POSET experience
  - Provide feedback to CPL for improving POSET
2. Providing a copy of this form to CPL allows a record of completion as part of the expectations for the Achievement in Medical Education Program (AMEP) and is used for CPL program evaluation.

**POSET Observation Form**

Observed instructor name:

Observer name:

Name of course/block/rotation:

Date of learning session:

Type of learning session (e.g., didactic, rounds, clinical reasoning session, etc.):

Number of learners present:

Debrief meeting Date:

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Instructor behavior	Observation	Take-away or feedback point

## Teaching Behaviors Menu for Peer Observation of Teaching

A list of behaviors that peer observer and observee can review and *may* select from in advance (along with items generated by the peers) to determine the focus on a few specific characteristics of the observed teaching session).

*Learning session* refers to any circumstance where an instructor is present with one or more learners with the intention to activate, generate, and/or assess learning.

“x “ marks reveal, by size, *possible* relevance to different teaching and learning settings

Observed behavior	Large group	Small group	Hospital/ clinic service	Labs / Simulation
<b>Beginning of learning session</b>				
Gaining learner attention		×	×	×
Introducing topic and focus of learning for the session	×	×	×	×
Stating learning objectives and their relevancy to topic and course	×	×	×	×
Linking to pre-work or prior knowledge	×	×		×
<b>Didactic presentation</b>				
Clarity (e.g., volume, pace, nervousness)	×	×	×	×
Organization (e.g., outlines, transitions, connections between concepts, introduction-body-conclusion)	×	×		
Content appropriate to level of learner	×	×	×	×
Quality of presentation slides, handouts, or other learning aids	×	×		×
Providing opportunity for learners' questions	×	×	×	×
<b>Teacher Characteristics and Dynamics</b>				
Exhibiting enthusiasm and stimulated interest in content.	×	×	×	×
Using appropriate voice/volume, gestures, movement and eye contact	×	×	×	×
Responding to questions	×	×	×	×
Using/demonstrating/use of devices & equipment			×	×
<b>Learning Climate</b>				
Encouraging learner participation and questions	×	×	×	×
Incorporating learners' ideas/questions into discussion/presentation	×	×	×	×
Developing an environment for respectful sharing of different views	×	×	×	×

<b>Observed behavior</b>	<b>Large group</b>	<b>Small group</b>	<b>Hospital/ clinic service</b>	<b>Labs / Simulation</b>
<b>Managing Session</b>				
Managing time through pace of session and start and end times	X	X	X	X
Meeting of session objectives	X	X	X	X
Providing for interactivity among learners	X	X		X
Providing time to learners to organize thoughts and respond to questions	X	X	X	X
Managing quality of learners' collaborative learning	X	X	X	X
<b>Teaching with patient (real or simulated) encounters</b>				
Teaching interpersonal skills with patients (e.g. physical exam, patient/family history, mental status interview)			X	
Providing opportunities for learners to demonstrate interpersonal skills with patients (e.g. physical exam, patient/family history, mental status interview)			X	
Providing opportunities for learners to explain procedure, anticipate instrumentation			X	X
Observed learner doing a procedure			X	X
<b>Professionalism</b>				
Teaching respect for learners, patients, staff, and/or peers		X	X	X
Demonstrating/models respect for learners, patients, staff, and/or peers		X	X	X
Teaching teamwork and leadership strategies		X	X	
Using humor / anecdotes appropriately	X	X	X	X
<b>Promotion of critical thinking, clinical reasoning, knowledge retention, self-directed learning</b>				
Using questions to probe learners' thinking and reasoning	X	X	X	
Asking for differential diagnosis and plan		X	X	
Fostering active and interactive learning	X	X	X	X
Encouraging learners to be self-directed	X	X	X	
Encouraging learners to question and critique	X	X	X	
<b>Evaluation and Feedback</b>				
Using effective questioning techniques to assess learners' knowledge/skills/attitudes	X	X	X	X
Offering suggestions for improvement		X	X	X
Providing reasoning/justification when changing learner's plans/technique		X	X	X



**POSET Observation Form – Didactic SAMPLE**

Observed instructor name:

Observer name:

Name of course/block/rotation:

Date of learning session:

Type of learning session (e.g., didactic, rounds, clinical reasoning session, etc.): *Didactic*

Number of learners present:

Debrief meeting Date:

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Instructor behavior	Observation	Take-away or feedback point
Stating learning objectives and their relevancy to topic and course		
Organization (e.g., outlines, transitions, connections between concepts, introduction-body-conclusion)		
Quality of presentation slides, handouts, or other learning aids		
Providing for interactivity among learners		
Providing time to learners to organize thoughts and respond to questions		

**POSET Observation Form – *Small-Group Session SAMPLE***

Observed instructor name:

Observer name:

Name of course/block/rotation:

Date of learning session:

Type of learning session (e.g., didactic, rounds, clinical reasoning session, etc.): Facilitation of small-group, case discussion

Number of learners present:

Debrief meeting Date:

Instructor behavior	Observation	Take-away or feedback point
Encouraging learner participation and questions		
Developing an environment for respectful sharing of different views		
Teaching teamwork and leadership strategies		
Encouraging learners to question and critique		
Providing reasoning/justification when changing learner's plans/technique		

**POSET Observation Form – Clinical Reasoning Course SAMPLE**

Observed instructor name:

Observer name:

Name of course/block/rotation: Clinical Reasoning I

Date of learning session:

Type of learning session (e.g., didactic, rounds, clinical reasoning session, etc.): Facilitated small-group

Number of learners present:

Debrief meeting Date:

Instructor behavior	Observation	Take-away or feedback point
<i>Facilitated/participated in discussion of agenda for session</i>		
<i>Facilitated/educated students on concepts in clinical reasoning (i.e. problem list, problem representation, illness script)</i>		
Providing for interactivity among learners		
Providing time to learners to organize thoughts and respond to questions		
<i>Asks questions for the benefit of learning (e.g. thought-provoking questions about the differential diagnosis)</i>		
<i>Time spent in teaching (e.g., at the white board or in small group)</i>		

Non-italics entries from the Overt Teaching Behaviors Menu

**POSET Observation Form – Teaching on Rounds SAMPLE**

Observed instructor name:

Observer name:

Name of course/block/rotation:

Date of learning session:

Type of learning session (e.g., didactic, rounds, clinical reasoning session, etc.):

Number of learners present:

Debrief meeting Date:

Instructor behavior	Observation	Take-away or feedback point
Introducing topic and focus of learning for the session		
Exhibiting enthusiasm and stimulated interest in content		
Teaching interpersonal skills with patients (e.g. physical exam, patient/family history, mental status interview)		
Providing opportunities for learners to demonstrate interpersonal skills with patients (e.g. physical exam, patient/family history, mental status interview)		
Teaching respect for learners, patients, staff and/or peers		
Teaching teamwork and leadership strategies		

# POSET Self-Reflection and Feedback- Observee

Your name: \_\_\_\_\_

Date of Observation: \_\_\_\_\_

Name of Colleague: \_\_\_\_\_

Thank you for contributing your time and your commitment to teaching excellence by participating as an observee in a Peer Observation in Support of Effective Teaching opportunity. We ask that you take a few minutes to review the following prompts, to develop a brief written personal reflection, and provide important feedback for improving the peer observation process.

Please note that this information is collected in order to evaluate the effectiveness of the POSET process and comments will remain confidential. Completing the form is also intended to provide an opportunity for self-reflection that will benefit your assessment of participating in POSET.

## Pre-observation interview:

Did the interview meet your expectations as part of the process? If not, please explain why not.

## Observation:

Did the observation of your instructional session meet with your expectations as part of the process? If not, please explain why not.

## Post-observation feedback conversation:

Did the feedback conversation after the observation meet your expectations as part of the process? If not, please explain why not.

*Please consider sharing this optional reflection with us, too: How might your participation in this observation impact your future teaching?*

# POSET Self-Reflection and Feedback - Observer

Your name: \_\_\_\_\_

Date of Observation: \_\_\_\_\_

Name of Colleague: \_\_\_\_\_

Thank you for contributing your time and your commitment to teaching excellence by participating as an observer in a Peer Observation in Support of Effective Teaching opportunity. We ask that you take a few minutes to review the following prompts, to develop a brief written personal reflection, and provide important feedback for improving the peer observation process.

Please note that this information is collected in order to evaluate the effectiveness of the POSET process and comments will remain confidential. Completing the form is also intended to provide an opportunity for self-reflection that will benefit your assessment of participating in POSET.

## Pre-observation interview:

Did the interview meet your expectations as part of the peer observation process? If not, please explain why not.

Did any issues arise during the interview that you felt unprepared for? Do you have suggestions for how training could diminish concerns for other observers?

## Observation:

Was the observation form adequate for guiding your observation? If not, what changes do you suggest?

Did any issues arise during the observation that you felt unprepared for? Do you have suggestions on how training could diminish concerns for other observers?

## Post-observation feedback conversation:

Did the feedback conversation meet your expectations as part of the process? If not, please explain why not.

Did any issues arise during the feedback conversations that you felt unprepared for? Do you have suggestions for how training could diminish concerns for other observers?

*Please consider sharing this optional reflection with us, too:* How might your participation in this observation impact or provide insights for your own teaching?