

Expectations of and for Clerkship Directors: A Collaborative Statement from the Alliance for Clinical Education

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Purpose: The clerkship director (CD) is an essential leader in the education of medical students on clinical rotations. This article represents a collaborative effort of the national clerkship organizations that comprise the Alliance for Clinical Education (ACE), a multidisciplinary group formed in 1992. ACE suggests that selection of a CD be regarded as an implied contract between the CD and the department chair that each will take the steps to ensure the success of the clerkship and of the CD. This article sets standards for what should be expected of a CD and provides guidelines for the resources and support to be provided to the person selected for leadership of the clerkship.

***Summary:** In their roles as CDs, educators engage in three principal activities: administration, teaching, and scholarly activity, such as educational research. This article describes (a) the work products that are the primary responsibility of the CD; (b) the qualifications to be considered in selection of a CD; (c) the support structure, resources, and personnel that are necessary for the CD to accomplish his or her responsibilities; (d) incentives and career development for the CD; and (e) the dedicated time that should be provided for the clerkship and the CD to succeed. Studies by several CD organizations conclude that 25% should be considered a minimum estimate of time for the administrative aspects of running a clerkship. With the added teaching and scholarly activities undertaken by a CD, a minimum of 50% of a full-time equivalent has been recognized as appropriate. The complexity and the need for timeliness in the cyclic and often repetitive tasks of the clerkship require that a full-time administrative assistant be part of the structure dedicated to running the clerkship.*

***Conclusion:** ACE recommends that institutions have clear standards for what is expected of the director of a clinical clerkship and have correspondingly clear guidelines as to what should be expected for CDs in their career development and in the support they are given.*

The clerkship director (CD) is an essential, perhaps the most important, academic leader in the education of medical students on clinical rotations. These clerkships have been at the core of clinical training for more than a century. In the past 2 decades, the emergence of scholarly and professional organizations for CDs, created to foster excellence in clinical rotations, has nurtured a group of academic managers specifically tasked with preparing students in the final stages of their training before receiving the MD degree. This article represents a collaborative effort of the clerkships organizations that comprise the Alliance for Clinical Education (ACE), a multidisciplinary group formed in 1992 to enhance clinical instruction of medical students. The educational organizations of ACE (listed at the end of this article) are committed to promoting excellence in the clinical education of medical students through collaboration across specialties.

ACE represents the commitment of clinical departments to work across departmental lines in the training of medical students, so they can acquire the fundamental clinical skills that are the basis of a professional career.¹ The AAMC has supported CDs through workshops to develop their skills and through publications.² Individually, several ACE groups have prepared statements of their expectations “of and for” their clerkship directors, including itemized descriptions of the work products and outcomes that are the essentials of students’ education on clinical rotations and of the resources, time, and training that should be provided to the CD.^{3,4} This article provides guidelines that can be used by CDs, chairs, and deans to establish and communicate expectations regarding the CDs within an institution. A vision for medical education, and of what qualities a medical school graduate should possess, is the joint creation of faculty, our profession, students, and society. The CD helps shape that vision. This article describes the following:

1. The work products that are the primary responsibility of the CD.
2. The qualifications expected of a CD.
3. The resources in time, training, and personnel that are necessary for the CD to accomplish his or her responsibilities.
4. Incentives and career development for the CD.
5. The time that should be provided to the CD for the clerkship and the CD to succeed.

This article provides an appropriate time estimate for the CD position, validated by the tasks previously articulated. Because the role of CD is demanding and personal development in the job might be necessary for even experienced teachers, expectations have been articulated as either essential or desirable. Desired expectations that are not present initially provide a guideline for the continued development of all CDs.

Performance and Productivity of a Clerkship Director

Rationale

This section details the job description and duties of the CD. Responsibilities include curriculum development, documentation of the process and the products of the educational experience, and evaluation, feedback, and grading for individual students. The CD’s performance should be evaluated primarily on the degree to which the CD achieves these goals. This should be based largely on his or her ability to implement a comprehensive educational program in the clerkship and to evaluate both the program and the students. The scholarly activities of many CDs will include educational research and other forms of education-related scholarship, and these products may be considered as part of career development.

Essential Products for Which the Clerkship Director Is Responsible

The CD *must* produce or provide the following:

1. A full-time clinical experience that meets departmental and medical school learning objectives for the clerkship for every student.
2. A written set of core educational goals and objectives for the clerkship, with a plan for periodic review.
3. All schedules, including production and distribution.
4. Materials that support the curriculum, such as didactics and readings.
5. Clear and specific expectations and standards for student participation in patient care at clinical sites (call nights, papers, etc.).
6. An overall strategy for assessment of individual students and for programmatic evaluations linked to the goals and objectives.
7. Examinations, if used, that address core goals and that are current, valid, and reliable.
8. Written final grades for each student, with a narrative noting goals met, strengths, and areas for continued work.
9. For each clerkship cycle, a summary of students with academic difficulty and a clear strategy for remediation.
10. Reports on the sufficiency and comparability of clerkship experiences at all teaching sites.
11. Assistance to students applying to residency programs, such as letters of recommendation.

Desirable Products for Which the Clerkship Director Is Responsible

The CD *should* produce or provide the following:

1. Reports to the chair, departmental, or school-level education committees on student performance and program effectiveness.
2. Reports requested by the chair on faculty development, specifying departmental needs and available resources.
3. Recommendations to the chair or school-level education committee for changes in clerkship design or methods based on outcome measurements, resource availability, or current trends in education.
4. Summaries to the chair (or departmental review committee) on teaching contributions of faculty under consideration for academic promotion.
5. A budget describing the costs in faculty time, other personnel, and resources to execute the clerkship.

Qualifications of a Clerkship Director

Rationale

The CD should be able to manage a complex educational program in a changing environment. The CD must have the capability and commitment to be an effective teacher, with knowledge of the discipline and an understanding of curricular design and pedagogy. The qualifications for being a CD will enable effective leadership, both administrative and academic. The CD must have or develop the necessary business skill to manage the fiscal aspects of the course. These qualifications describe a person who, typically, is experienced as a clinician and educator and, if not already there, has the potential of becoming an associate or full professor. ACE regards selection of a CD as an implied contract between the CD and the chair that each will take the appropriate steps to ensure success of the clerkship and of the CD.

Essential Qualifications for a Clerkship Director:

The qualities and competencies of the CD reflect the school's commitment to student education. The CD is a role model who has earned the trust of students and colleagues and whose sense of duty to patients, families, coworkers, and learners should be an essential consideration in being selected as CD.

The CD *must*

1. Be able to provide overall vision for the clerkship in collaboration with faculty, the chair, and the dean.
2. Have working knowledge of national, school-wide, and department-specific curricular goals for students in his or her own community, school, and discipline; be willing and able to incorporate important interdepartmental clinical themes into the clerkship.
3. Be clinically experienced and (for physicians) board certified in his or her specialty; although CDs are typically physicians, the department's most qualified clinical educator may, at times, not be a physician.
4. Have experience with clinical supervision and classroom instruction of medical students.
5. Have skill in formative evaluation and feedback for individual students; be able to advise and supervise remediation for students with academic problems.
6. Be enthusiastic about students and regard undergraduate medical student education as a central focus of career development.
7. Be able to provide career guidance to medical students.
8. Be able to manage an individual clerkship site, including schedules for students and teachers, support personnel, educational budget, and office space.
9. Have sufficient management ability to achieve and demonstrate consistency in assessment across multiple clerkship sites, including summative evaluation of core, department specific and interclerkship goals such as interviewing, physical examination skills, communication skills, and the development of clinical reasoning skills.

Desirable Qualifications for a Clerkship Director

The CD *should*

1. Have prior relevant experience, such as a clerkship site coordinator, assistant CD, or assistant director of medical student education.
2. Have demonstrated excellence in teaching.
3. Have skills, willingness, and time to work with the dean's office and other departments to define interdepartmental goals.
4. Be able to motivate colleagues to teach and to recruit new faculty into teaching roles.
5. Have the professional skills to give feedback to teachers and provide faculty development in teaching for residents and junior faculty.
6. Be able to advise the chair on educational policy.
7. Be able to represent the department on committees such as student promotions or standards committee.
8. Have skill in strategic planning, to anticipate changes in resources and societal needs.

9. Be able to work with administration to maintain ongoing affiliations as well as recruit new teaching sites and affiliates.
10. Demonstrate interest and knowledge in educational theory and research methods.

Resources for Support of the Clerkship

Rationale

The complexity and the need for timeliness in the cyclic and often repetitive tasks of the clerkship necessitate that resources, clerical support, and protected time be given to the director and that the CD not be burdened with clerical tasks. CDs typically are important teachers and role models for students and therefore spend a disproportionate amount of time teaching in seminars, in lectures, and as part of their patient care activities. Scholarly activity is essential for academic promotion for most faculty, and many CDs should engage in educational scholarship to enhance clerkship education locally and nationally. A CD's success depends on support from the CD's supervisor, typically the chair, and ACE emphasizes, again, the implied contract in the selection of a CD and its corollary that there be resources sufficient to do the job.

Essential Resources

The CD *must* have

1. Control over educational resources and a defined budget for personnel, materials, and travel sufficient to meet the educational requirements of the clerkship and the professional development of the CD.
2. An assistant to be a "first contact" liaison with students; this person will typically have an administrative job description and must be approachable and sensitive to a student's distress, must be able to provide a sympathetic ear to students, and must bring pertinent information to the CD; this person will field questions,

relay messages, and serve as an initial contact for student crises. A full-time position is desirable.

3. Secretarial (clerical) support for the administration of the clerkship. The assistant described previously as first contact may take this role, but it is essential that the maturity of the person in this role not be scanted. There can be significant variation across and within specialties in clerkship length and in dispersion of students. In all cases, clerical support should be appropriate to the number of students, clerkship sites, and teachers. Typical clerical duties are shown in Table 1.

4. Secretarial support for patient care issues that are referred to the clerkship office.

5. Sufficient material resources (telephones, computers, photocopiers, fax machines, etc.) to support clerkship requirements and communicate with teachers and students, including those at remote sites.

6. Sufficient space resources for her- or himself, clerical staff, conference rooms, and student teaching.

7. Access to new technologies (hardware and software) and consultants that are necessary for educational and administrative aspects of the clerkship.

8. Sufficient dedicated time for clerkship administration including

- a. Orientating students.
- b. Evaluating students and preparing grades.
- c. Providing feedback to students.
- d. Managing the curriculum.
- e. Orienting teachers.

f. Maintaining clerkship integrity, including recruiting and developing new faculty and sites (e.g., ambulatory experiences) and devising solutions to marked loss in inpatient census when this occurs.

g. Mentoring and counseling students about career choice.

h. Writing letters of recommendation.

9. Additional time and clerical support for each additional course under his or her direction, such as Introduction to Clinical Medicine or 4th year subinternship rotations.

10. Time and resources to visit other sites where clerkship experiences occur.

Table 1. Clerical Duties Included in Support of Clerkship Administration

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- a. Making schedules for students and teacher assignments;
 - b. Reserving classrooms, and obtaining audiovisual and other equipment;
 - c. Ordering supplies (answer sheets, markers for board/overhead, slide trays, etc);
 - d. Preparing, photocopying and distributing written materials to students and teachers (obtain necessary copyright permission).
 - e. Collecting and filing student evaluations, and maintaining student records and databases for grading and systematic programmatic evaluation;
 - f. Distributing non-educational, but essential items as locker keys, parking passes, meal tickets, etc.;
 - g. Collecting and collating end-of-clerkship paperwork from students (such as critiques of teachers, patient log-books);
 - h. Proctoring and scoring exams as needed;
 - i. Communicating with Dean's Office, Office of Medical Education, other clerkship administrators;
 - j. Assisting in preparation of faculty performance evaluations for appointment, promotion, and teaching awards;
 - k. Preparing letters of recommendation for students (and as needed for faculty)
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Desirable Resources

The CD *should* have

1. Sufficient time dedicated to research and development in curricular evaluation and planning.
2. Sufficient time for evaluation and feedback to teachers.
3. Access to, and time for, a departmental education committee to review curricular goals and strategies and to review students with academic difficulty.
4. Access to statistical and informatics consultants to aid in curricular and assessment development and research.
5. Sufficient time available to participate in committee work that will lead to personal development (discussed subsequently).

Incentives and Career Development for the Clerkship Director

Rationale

The medical school curriculum cannot succeed unless the clerkships succeed. The value of the CD to the academic community must be explicitly and formally recognized in the promotion and tenure system. Many CDs are senior faculty, often associate or full professors.⁵⁻⁷ However, some CDs will be junior when they start and must plan for their trajectory to mature academic leaders and educational innovators. The roles of CD and residency program director should be viewed as comparably valuable positions, and one should not be seen as a stepping stone to the other. Finally, CDs should be expected to serve for some minimal period of time to allow both clerkship stability and their own development in educational scholarship.

Essential Support for the Career Development of the Clerkship Director

1. There must be recognition of the CD's educational productivity (discussed previously) as a qualification for promotion and, if applicable, tenure. There should be an explicit statement of how this productivity will contribute to the CD's professional and academic advancement.

2. A new CD must be familiar with the basic concepts, terminology, and application of educational practice. The CD should be given time and funding to attend a course for new CDs (or equivalent training) when available from the Group on Educational Affairs/Association of American Medical Colleges or his or her own clerkship organization in order to become

proficient in curricular design and evaluation, assessment of students and teaching, and feedback.

3. The CD should participate in a faculty development program that will familiarize her or him with personal, effective teaching behaviors and strategies to develop the behaviors in other teachers.

4. The CD should be given time and funding to attend national meetings for medical education such as the Association of American Medical Colleges and his or her own CDs' meeting.

5. The CD should be given time and funding for discipline-based continuing medical education to maintain credibility as clinician.

Desirable Career Development

1. The CD should be mentored by the chair and other leaders to acquire greater departmental responsibility and authority, including skills as a manager of budgets and resources. The CD should be considered for, and encouraged to seek, advancement to a position such as vice-chair for education, director of division of medical education within the department, or associate dean, as agreed upon with the chair.

2. The CD should assume other leadership positions within the department, for example, chair of an education committee, with the support of department leaders.

3. The CD should develop skills in educational research, including basic psychometrics and research design through a faculty development or mentoring program; pursuing grants for support of educational research is desirable and may be inversely related to the number of days spent in clinical practice of medicine.⁷

4. The CD should be allocated the resources to participate in educational innovation and research as evidenced by

- a. Presentations at national meetings.

- b. Published abstracts and exhibited posters at academic meetings.

- c. Peer-reviewed articles, book chapters, monographs, and books.

5. The CD should serve on a relevant education or evaluation committees in his or her own medical school and in national organizations.

Essential Time Allocation for the Clerkship Director to Fulfill His or Her Responsibilities

Most CDs contribute to the clerkship by engaging in three principal activities: administering the clerkship, teaching, and conducting educational research or other scholarly activity. Studies by several CD organizations conclude that 25% should be considered a minimum estimate of time for the administrative aspects of run-

ning a clerkship.^{5,8,9} CDs spend considerable time personally teaching students in seminars, in lectures, or in their patient care activities. They also may have responsibility for developing faculty in teaching skills. Scholarly activity in the clerkship is often a principal measure of productivity toward academic promotion and, so, is necessary for fostering both longevity in the CD position^{10,11} and the educational expertise necessary for a successful clerkship. Therefore, a minimum of 50% of a full-time equivalent has been recognized as appropriate^{2,5,8,9} and should be allocated for a CD position.

Summary

On behalf of its seven constituent organizations, ACE proposes these “expectations of and for the CD” as practice guidelines. They will help secure the necessary talent and resources to ensure that medical students have the fundamentals necessary for lifelong clinical practice. Above all, ACE wishes to set a high standard for clinical education in our medical schools. A great deal should be expected from our CDs. We believe that these expectations can be met with an investment in CDs as essential agents for curriculum, assessment, and innovation in clinical education.

This article represents a collaborative effort of ACE, and the recommendations included in the article have been endorsed by the leadership of its constituent organizations.

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