



The mission of the ACR Research and Education Foundation is to improve patients' lives through support of research and training that advances the prevention, treatment and cure of rheumatic diseases.

INSTRUCTIONS FOR ALL AWARDS

Application, format and submission requirement: All applications must be submitted electronically via the ACR REF Web site by 5:00 pm ET August 2, 2010. To submit your application, visit www.rheumatology.org/REF for a link to the online application. Please use 1 inch margins and Arial 11 point font for all documents submitted as part of your application and avoid jargon and abbreviations. Additional information concerning our awards and grants program is available at www.rheumatology.org/REF, or by contacting the REF at ref@rheumatology.org or (404) 633-3777.

Awards and Grants Policies: All applicants and award recipients must abide by REF Awards and Grants Policies at all times. A list of current policies is available at www.rheumatology.org/REF.

Review of applications: Applications will not be blinded for the review process. Any perception of conflict of interest for reviewers will be eliminated during this time. Only applications that are complete and received by the deadline will be reviewed. It is the applicant's responsibility to review their completed application for errors and to ensure that it adheres to the application instructions. Applicants are responsible for submitting all required application documents prior to the deadline noted below.

Notification and funding: Applicants will be notified as to the status of their award in December. If there is a citizenship requirement, proof of citizenship will be requested at the time of notification. Funding will begin in July 2011.

Application deadline is 5:00 pm ET August 2, 2010

Purpose

The intent of the ACR REF Clinician Scholar Educator Award is to develop and support educational scholars in the field of rheumatology. These unique individuals serve as excellent role models for future rheumatologists and rheumatology health professionals and deserve recognition and support. Through this award, applicants should demonstrate their goal of developing a career in medical education and training, with the aim of enhancing education in the musculoskeletal and rheumatic diseases, and of attracting the best trainees into a career in rheumatology.

Eligibility

Candidates must be ACR or ARHP members with experience in the training of medical and graduate students, residents and fellows. Candidates must be affiliated with an accredited graduate school, an LCME-accredited medical school or an ACGME-accredited training program in internal medicine, pediatrics or rheumatology. A faculty appointment is not essential. Clinicians who are in private practice and are affiliated with an academic institution are encouraged to apply.

Past recipients of this award are not eligible to apply again.

Citizenship

The applicant must be a citizen or noncitizen national of the United States, or be in lawful possession of a permanent resident card. Non-citizen nationals are generally persons born in outlying possessions of the United States (e.g., American Samoa and Swains Island). Individuals on temporary (J1, H1) or student visas are not eligible.

Award Terms and Funding

Each institution is limited to one active award per funding cycle; however, institutions may submit multiple applications. The award recipient is expected to devote at least 25 percent effort to career development, including formal training in education, and to the award project to achieve the goal of developing into an educational scholar. Awards are funded for up to three years. The second and third year of support is conditional based upon substantial accomplishments during year one. Progress reports, including updated benchmarks and progress toward goals, will be used to measure success and will be reviewed by the REF Scientific Advisory Council.

In order to provide direction for awardees, particularly those who do not have access to other educational scholars in their own institution, a mentoring component is also built into this award. An Advisory Panel composed of former Clinician Scholar Educator awardees will serve this function.

The annual award amount of \$50,000 will be paid directly to the sponsoring institution. Payments will be disbursed in two equal installments in July and January. The award must be directly applied to the individual applicant's salary and is intended to support direct salary costs for each year of the award. An additional \$10,000 per year may be awarded upon request and justification to help cover the costs of tuition for a formal educational training program, advanced degree program, travel to educational meetings, and/or development of an educational product. Award of this supplement will be based on proposed budget and justification.

Review Criteria

Applications will be peer reviewed and awarded based on overall merit. This award will be reviewed based on the following criteria:

1. **Strength and innovation of the project proposal.** Proposal strength will be assessed based upon Glassick's six criteria for educational scholarship. These include: Clear Goals, Up to Date Knowledge, Appropriate Methods, Adequate Preparation, Effective Presentation and Critical Analysis. The project must include measurable outcomes as well as a plan to produce a final educational "product." A "final product" is defined as a tangible instrument or item that can be used for educational purposes (e.g. curriculum, teaching methodology, instructional video, publication) and that can, and will, be disseminated to others.
2. **Plan for career development, with the goal of development into an educational scholar.** This should include explicit plans for advanced educational training and identification of a mentoring committee composed of at least one person from the applicant's institution and one person outside the institution. If an intramural mentor cannot be identified, then members of the Clinical Scholar Educator Advisory Panel can serve in this capacity.
3. **Experience and quality of past teaching activities based on a review of the applicant's Educational Portfolio.** This portfolio should include five categories of accomplishment, including: Direct Teaching, Curriculum Development, Advising and Mentorship, Educational Administration and Leadership, and Educational Scholarship. All types of prior involvement in clinical education will be considered, including serving as a clinical preceptor, directing a rheumatology rotation, serving as a mentor, etc.
4. **Evidence of Institutional commitment to the applicant.** The application should include a letter from the applicant's division head documenting provision of at least 25% protected time for educational and scholarly activity for the duration of the award and support for the applicant's plan to develop a career and to be promoted within their institution on the basis of their educational performance and scholarship.

Reporting Requirements

The recipient and mentor will provide the REF with annual reports on the progress of the research project(s). Progress reports must follow REF guidelines and be completed using a template provided by the REF. Furthermore, the awardee must provide a final report (in addition to the annual progress report) at the end of the award term noting any unexpended funds and discussing project outcomes such as abstracts, submitted or published articles, other grants obtained, or invited reviews. All reports must include an updated Educational Portfolio. It is anticipated that preparation and development of the Educational Portfolio will aid in the applicants' promotion at their own institution. The division chief or program director must provide assurance of protected time and verify the accuracy of these reports by signing and approving each report.

Recipients must participate in all efforts to track the outcome of trainees that participate in the educational activities during the time of the award and at three, five, seven and ten years after the award. This data is essential to measure the success of the award. Failure to comply by REF deadlines, with award terms and conditions, reporting requirements, and proposed time/effort commitments may result in future REF applications from the institution being disallowed.

In an effort to effectively evaluate the impact of this award, all recipients will also be required to complete an online evaluation each year. An e-mail link to the evaluation will be provided at least 30 days prior to the due date.

In order to help disseminate the scholarly work accomplished during the award period to the broader rheumatology community, awardees are also expected to present the results of their project in the third year in an annual session during the ACR Annual Scientific Meeting.

Application Instructions

Only online applications submitted through the REF Web site will be accepted. Incomplete applications will not be accepted. It is the applicant's responsibility to review the application for completeness and errors, and to ensure that it adheres to all REF instructions. Applicants are responsible for submitting all required sections and documents prior to the deadline noted on page 1 of this application. **It is highly recommended that you begin preparing your application at least four (4) weeks prior to the grant submission deadline.**

Each item must be saved and uploaded to the online application separately. For example, item one of this application, institutional statement, must be saved as a MS Word or Adobe PDF file per the following instructions and uploaded when prompted in the online application.

- All files must be in either MS Word or Adobe PDF format and saved as „.doc’ or „.pdf’ files; Save all MS Word documents as „.doc,’ **not** ‘.docx’
- All templates are available for download on the Web site
- Use one inch margins, Arial font and 11-point font size (does not apply to figures and tables)
- The header of each page must contain the applicant's last name and first initial (formatted as lastname, firstinitial)
- Filenames should be named according to section (e.g., “1InstiStmt.doc”) and must not exceed 15 characters in length
- Additional file uploads should be numbered consecutively and named relevant to their content (e.g., „2PatientPop.doc’)
- Avoid using jargon and abbreviations within your application
- Review all documents once uploaded and before final submission

You will be asked to provide the following:

1. Abstract page – to include the following:

- **Project Title:** Include your project title at the top of your abstract page. Make your title specific and detailed. It should clearly state the topic of your proposal and is limited to 56 characters, including spaces between words.
- **Abstract – limited to 300 words:** Succinctly describe the hypothesis to be tested, the specific aims or global objectives of the project and the expected results.
- **Key Words:** At the bottom of your abstract page, please include **three key words** that accurately describe the project.

2. Educational Portfolio – limited to six pages

Download, complete and submit the Educational Portfolio. See example of the template below. This document will summarize the candidate's professional educational achievements over the past three to five years and provide insight into their personal philosophies regarding education. Supplemental material will not be considered during the review process. The candidate will provide a statement supporting his or her expertise in all of the following areas that pertain to his or her experience:

- Background Information (to be completed by all applicants)**
- Philosophy of education (to be completed by all applicants):** A very brief description of the applicant's personal theory of learning and teaching in the clinical setting.
- Design, development and/or evaluation of curricula/programs**
- Teaching skills:** Documentation of teaching experience. Include the level of the target audience, year, duration and topic/clinical setting.
- Assessment of learner performance:** The construction and implementation of assessment measures with their associated evidence of reliability, validity and other psychometric indices.
- List of formal and informal advisors and evidence of impact.**
- Educational administration:** Educational leadership and management positions, committee and task work service, and evidence of outcomes.
- Regional/national scholarship:** Membership and leadership in educational organizations, relevant educational publications, extramural support for educational activities, the development of instructional materials with data regarding quality, peer review and dissemination.
- Continuing education:** Documentation regarding growth in knowledge and skills as an educator.
- Honors and awards:** Recognition by peers and trainees with description of award selection process.
- Long-term goals:** Reflection on portfolio and future plans, often linked to continuing education.

3. Project proposal - limited to five pages including references

The proposal must describe the following:

- a. **Specific goals** and objectives for the proposed experience
- b. **Significance** of the proposal in achieving the goal of attracting trainees to rheumatology
- c. **Level of trainees** involved
- d. **Clinical environment and facilities** (ambulatory clinic, inpatient setting, etc.)
- e. **Type of educational interaction** (clinic supervision, inpatient service, mentorship program, etc.)
- f. **Suggested program areas for development and support.** These may include:
 - Development and/or implementation of standardized teaching curriculum
 - Development and/or implementation of web-based education approaches
 - Formation of student interests groups
 - Implementation of pre/post test teaching materials
 - Implementation of case-based teaching for students, residents or fellows
 - Participation in integrated, interdepartmental ambulatory curriculum
 - Developing models of ambulatory-based rheumatology learning
 - Development of rheumatology trainee mentoring programs
- g. **Metrics:** Outline how you will measure the success of the project, and each individual goal and objective. Include specific measurable metrics you will use and detail any plans for data analysis.
- h. **Final product:** The final product is defined as a tangible instrument/item, which can be used for educational purposes (e.g. teaching curriculums, lecture, and teaching video).

4. Career Development Plan – limited to two pages

Submit a detailed plan for career development over the next 3-5 years, with the goal of development into an educational scholar. This should include explicit plans for advanced educational training and identification of a mentoring committee composed of at least one person from the applicant's institution and one person outside the institution.

5. Benchmarks of Success

Download, complete and submit the Benchmarks of Success template. See example of the template below. These benchmarks should be applied to all relevant aspects of the proposal and must be measurable.

6. Budget & Justification

Download, complete and submit the Budget & Justification template. See example of the template below. Applications must include an itemized budget indicating the expected amount of salary from the award, up to a maximum of \$50,000 annually (this includes fringe, if requested). Fringe benefits are allowed at a maximum rate of 30%. A statement from the institution's contract office explaining the institution's maximum fringe benefit rates must be included. Applications without this supporting documentation will not be considered. (Note: you can search your institution's Web site for its fringe rate.)

If requesting the additional \$10,000, include this on the budget sheet and provide a justification. This supplement may be used to help cover the costs of tuition for a formal educational training program, advanced degree program, travel expenses to educational meetings and/or development of an educational product. All recipients are expected to attend the Program Directors Retreat each spring, as well as the ACR/ARHP Annual Scientific Meeting each fall. Please build these expenses into the CSE budget if not covered elsewhere.

7. Distribution of Time chart

Download, complete and submit the Distribution of Time chart. See example of the template below. Provide an overview of how the percentage of time will change upon receipt of the award as well as in the future. The applicant's institution or clinical practice representative must complete and sign the Distribution of Time chart.

The award recipient must devote at least 25 percent full-time professional effort to career development, including formal training in education, and to the award project to achieve the goal of developing into an educational scholar.

8. Other Support

Submit a list of applicant's other current and pending support. Other support includes all financial resources, Federal or non-Federal, or, commercial or institutional, available in direct support of an individual's research endeavors, including but not limited to research grants, cooperative agreements, contracts, and/or institutional awards. Information on other support should be provided in the format shown below:

NAME OF INDIVIDUAL

ACTIVE/PENDING

Project Number (Principal Investigator) Dates of Approved/Proposed Project % Effort/Time
Source Annual Direct Costs

Title of Project (*or Subproject*)

The major goals of this project are...

OVERLAP

9. Letters of Support

- a. **Letter of Institutional Support:** The applicant's institution or clinical practice must provide written assurance for protection of at least 25% of the candidate's time so that they may achieve the goal of enhancing the educational rheumatology experience for the trainees. The percentage of time provided for the award activities must be at least 25%, but may be more, commensurate with the level of the award. The level of commitment from the applicant's institution or clinical practice will be a strong consideration in the review process. While not mandatory, these groups should provide for innovative ways to protect and support awardees during and following the period of the award.

At **minimum**, the letter of institutional support must include an explicit explanation of the following:

- Support of the candidate's qualifications for this award.
- A detailed explanation of the candidate's current salary support and how this award will restructure the candidate's salary support. This award is **not** intended to replace existing salary support for educational activities.
- Explicit assurance of protection of at least 25% of the candidate's time to achieve the goals of the award, and ways to protect and support the candidate during and following the period of this award.

- b. **Training Program Director:** A signed letter of support from any training program (medical school, residency, etc.) director whose curriculum is included in the program must also be included. This letter of support must include an explicit agreement to implement the proposed curriculum changes and specify the proposed changes.

2. Educational Portfolio

NAME	POSITION TITLE		
INSTITUTION			
EDUCATION/TRAINING <i>(Begin with baccalaureate or other initial professional education, and include postdoctoral</i>			
INSTITUTION AND LOCATION	DEGREE <i>(if applicable)</i>	YEAR(s)	FIELD OF STUDY

The Educational Portfolio may not exceed six pages. Follow the format and instructions in the sample below. Supplemental material will not be considered during the review process.

Note: Anticipating a diverse applicant pool, the portfolio is intended to be sufficiently broad to capture educational achievements from a large and varied group. Many individuals will not have activities for every category; therefore, candidates are only expected to complete those areas that pertain to their experience.

Your Educational Portfolio should summarize your professional educational achievements over the past 3-5 years and provide insight into your personal philosophies regarding education. Please provide a statement supporting your expertise in the following areas that pertain to your experience:

A. Background Information (to be completed by all applicants): A brief summary of employment history, work experience and professional memberships.

B. Educational Philosophy (to be completed by all applicants): A very brief description of the applicant's personal theory of learning and teaching in the clinical setting.

C. Design, development and/or evaluation of curricula/programs

D. Teaching skills: Documentation of teaching experience. Include the level of the target audience, year, duration and topic/clinical setting.

E. Assessment of learner performance: The construction and implementation of assessment measures with their associated evidence of reliability, validity and other psychometric indices.

F. Educational administration: Educational leadership and management positions, committee and task work service, and evidence of outcomes.

G. Regional/national scholarship: Membership and leadership in educational organizations, relevant educational publications, extramural support for educational activities, the development of instructional materials with data regarding quality, peer review and dissemination.

H. Continuing education and professional development: Documentation regarding growth in knowledge and skills as an educator.

I. Honors and Awards: Recognition by peers and trainees with description of award selection process.

J. Long-term goals: Reflection on portfolio and future plans, often linked to continuing education.



K. List of formal and informal advisors and evidence of impact

5. Benchmarks for Success

The benchmarks (expected status of the project at various points in time) included in your original application will be used to evaluate progress and to facilitate communication between investigators and the CSE Advisory Committee. The milestones should reflect the specific aims of the proposal and be presented within the context of measurable outcomes and production of a final educational “product.” A final product is defined as a tangible instrument or item that can be used for educational purposes (e.g. curriculum, teaching methodology, instructional video, publication) and that can and will be disseminated to others.

GOALS <i>(Should be listed in order of priority)</i>	Metrics for Success <i>(Projected end points)</i>	Expected completion

Applicant Name (Last, first initial):

DETAILED BUDGET – CSE Year 2 <i>DIRECT COSTS ONLY</i>		FROM 07/01/2012	THROUGH 06/30/2013
NAME	Fringe Rate*	SALARY REQUESTED	FRINGE BENEFITS* TOTAL COST
SALARY SUBTOTAL 			\$
<i>*Not to exceed 30%; Must provide institutional documentation of fringe rate</i>			
EDUCATIONAL EXPENSES (Itemize by category)**			
Justification:			
OTHER EXPENSES SUBTOTAL 			\$
TOTAL DIRECT COSTS FOR INITIAL BUDGET PERIOD			\$
<p>**Note: The annual award amount of \$50,000 must be applied directly to salary and fringe; however an additional \$10,000 per year may be requested for educational expenses only as outlined in the award application. This additional amount requires a separate justification, to be included above. All recipients are expected to attend the Program Directors Retreat each spring, as well as the ACR/ARHP Annual Scientific Meeting each fall. Please build these expenses into the CSE budget if not covered elsewhere.</p>			

7. Distribution of Time

The award recipient must devote at least 25 percent full-time professional effort to career development, including formal training in education, and to the award project to achieve the goal of developing into an educational scholar.

<u>ACTIVITY</u>	<u>DURING AWARD</u>	<u>DESCRIPTION</u>
Clinical w/ trainee	_____	_____
Clinical w/o trainee	_____	_____
Teaching – funded	_____	_____
Teaching – unfunded	_____	_____
Administrative	_____	_____
Other (explain below)	_____	_____
TOTAL*	_____	*Column must total 100%

Other Explanation: _____

Definitions:

- During award* Time applicant would spend on activities if award is received
- Clinical w/o trainee* Clinical activity done without a trainee
- Clinical with trainee* Clinical activity done with a trainee, including clinical teaching activities, such as ward rounds and clinics
- Teaching - funded* Teaching activity in a non-clinical setting that is or will be supported
- Teaching - unfunded* Teaching activity in a non-clinical setting that is or will be unsupported