

Office of  
Faculty Affairs

Appointments,  
Promotion  
& Tenure

# NON-TENURE TRACK GUIDELINES

Where every step forward is  
**SEEN, SUPPORTED, & CELEBRATED**



Wake Forest University  
School of Medicine



ADVOCATE HEALTH

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# Faculty Promotion Guide for the Non-Tenure Track

(updated April 2025)

***Starting in 2025, all Promotion and Tenure applications will be submitted electronically using the faculty management system Mountain Pass. No submissions will be accepted manually.***

**The Non-Tenure Track** is reserved for faculty members embedded within the Medical School who are involved in several aspects of their department's mission focused on four Areas of Distinction (AOD):

- Investigation and Inquiry
- Clinical and Patient Care
- Teaching and Mentoring
- Service and Administration

The Non-Tenure Track is designed to allow faculty to be promoted based on the skills and roles they have developed throughout their career and to recognize that roles and skills may evolve over a faculty member's career. There is a moderately high expectation of scholarly activity and will be dependent on the goals of each faculty member aligned with the four Areas of Distinction. Scholarly activity is defined as activities (in education, clinical areas, and/or research) in which a faculty member not only applies current knowledge and resources in their field but also creates and broadly disseminates new knowledge and scholarly products to advance the field. Promotion is based on both quality and quantity of scholarship. Faculty can apply at any time during their career for promotion, and time in rank is not a consideration for the timing of an application.

## Non-Tenure Track Promotion Application Materials to Prepare

Faculty applying for promotion to Associate Professor or Professor should prepare the following items for review. All information submitted to the promotion review committee is listed here. You do not need to prepare or submit any documents that are not discussed in this guide. For example, you do not need to include copies of manuscripts or publications.

The materials requested by the review committee were streamlined and recently updated. Do not organize your portfolios based on examples from prior candidates created before 2025.

<b>Curriculum Vitae</b>	Use current Wake Forest University School of Medicine (WFUSM) format available on Faculty Affairs website. It is important to number publications in each section and only list manuscripts that are formally accepted, in press, or published. Do not list any manuscripts that are "submitted". List PMID numbers for all published manuscripts when available. See Appendix A.
<b>Areas of Distinction Personal Narratives</b>	<b><i>Required of all candidates.</i></b> Up to one page maximum length for each Area of Distinction Personal Narrative (Two pages in total). See exception for selection of three AODs. See Appendix C.
<b>Teaching Portfolio</b>	<b><i>Required of all candidates.</i></b> Up to 30 pages. Include teaching evaluations, examples of teaching materials, and supplemental materials. See Appendix A.



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<b>Clinician Portfolio</b>	<b><i>Required of all clinicians.</i></b> Up to 20 pages. Include summary of clinical activities, evaluations of clinical work, and supplemental materials. See Appendix B.
<b>Teaching Roles and Responsibilities Spreadsheet</b>	<b><i>Required of all candidates.</i></b> Use the Excel template available on the Faculty Affairs website to list intramural and extramural teaching activities. Modify the template as needed to highlight your educational activities as a faculty member. For teaching on a recurring basis, list single entries with multiple dates listed within each entry.
<b>Grant Funding Spreadsheet</b>	<b><i>Required of all candidates.</i></b> Candidates with current and/or past grant funding should complete this spreadsheet with the requested information. Use the Excel template available on the Faculty Affairs website.
<b>Candidate Evaluators Spreadsheet</b>	<b><i>Required of all candidates.</i></b> Use the link provided in Mountain Pass to upload the names and contact information for external evaluators. See below for additional details.



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## Document Preparation Guide for Promotion Applications

### PDF files prepared and uploaded by promotion candidate

Generate all PDF files by directly converting electronic source material using Adobe Acrobat Professional or similar. Do not print and then scan materials that were generated electronically. Scanning to PDF format should only be used for materials that are not already available in an electronic file format, such as handwritten letters.

### Preparation of Curriculum Vitae

Required for all candidates. Submit your CV as a PDF file. Make sure you are using the current Wake Forest School of Medicine CV template which is available on the Faculty Affairs website for promotion materials. Be sure that items are listed in chronological order in each section. Publications and presentations should be numbered in each subsection. Only list manuscripts that are formally accepted, in press, or published. Citations for papers that are submitted or in review should not be included.

### New 2025 requirements for CV preparation

1. In the academic appointment section, indicate clearly any adjunct appointments. The word “adjunct” should be included in the title.
2. In **Grant Funding**, include both the start and stop dates.
3. In **Grant Funding**, include the direct grant funding amount in US dollars only (\$).
4. In the **Bibliography**, include PMID number for all publications when available
5. In the **Bibliography**, the following should now be separated into their own sections:
  1. Peer Reviewed Case Reports
  2. Letters to the Editor
  3. Editorials
  4. Books Edited
  5. Books Authored
  6. Book Chapters
  7. Media Presentations and Interviews
  8. Electronic Publications
6. In **Presentations at Professional Meetings**, separate Regional, National, and International presentations into their own sections.
7. In **Invited Extramural Presentations and Seminars**, separate Regional, National, and International presentations into their own sections.
8. **NEW: Intramural Presentations and Seminars.** This new section allows all intramural presentations to be placed on the CV. This should include Wake Forest University School of Medicine, Carolinas Medical Center, Atrium Health Wake Forest Baptist or Advocate Health presentations or Grand Rounds events and other intramural presentations from previous institutions. Please include the presentation title, the institution and date of the presentation.

### Preparation of Area of Distinction Personal Narratives

When completing the promotion application, each Non-Tenure Track faculty will declare which Areas of Distinction (AOD) will be highlighted in their promotion portfolio. Promotion consideration for Non-Tenure Track faculty members will require:

1. Achievement of Excellence in one AOD and demonstration of a Significant Contribution in a second AOD.  
**OR**
2. Demonstration of Significant Contributions in three AODs.

The Areas of Distinction are:

- Investigation and Inquiry
- Clinical and Patient Care



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- Teaching and Mentoring
- Service and Administration

Additional descriptions of the AODs are included in Appendix C.

The selected Areas of Distinction should represent the candidate's major areas of achievement, impact, and reputation, and is evidence of the candidate being an expert and leader in the field, primarily through substantial and sustained peer-reviewed scholarly activity. **Each candidate will use their personal narrative to demonstrate their career progression through the selected AODs towards "Excellence" or as a "Significant Contribution.** For each AOD selected, the promotion candidate will write no more than a 1-page Personal Narrative that clearly describes their career progression between ranks. For candidates requesting promotion to Associate Professor, the narrative should begin at their first appointment at the rank of Assistant Professor, and for candidates requesting promotion to Professor, the narrative should begin at their first appointment at the rank of Associate Professor. The Personal Narrative should closely follow the scholarly work presented in the CV and should discuss only information clearly documented in the promotion portfolio. For candidates requesting promotion to Associate Professor, each Personal Narrative should clearly support a strong regional reputation, and for candidates requesting promotion to Professor, each Personal Narrative should clearly support a strong national reputation. If an AOD selected by a candidate requesting promotion to the rank of Professor is different from an AOD selected when the candidate was promoted to the rank of Associate Professor, this should be noted at the beginning of each Personal Narrative with a brief description of why the AOD has changed.

## **Teaching Portfolio (Required of all candidates regardless of AOD selection)**

Required of all candidates. **A well-developed Teaching Portfolio is essential for evaluation in the Teaching and Mentoring AOD.** This portfolio can be up to 30 pages only and should be combined into a single PDF file rather than a collection of numerous files. Include teaching evaluations the candidate has received combined with any supplemental materials the candidate wishes to include that highlight their teaching and educational accomplishments. Additional information about this portfolio is available in Appendix A (see below). For candidates that have not chosen the Teaching and Mentoring AOD as one of the primary AODs, this portfolio will most likely be less robust than candidates choosing Teaching and Mentoring as a primary AOD.

## **Teaching Roles and Responsibilities Spreadsheet (Required of all candidates regardless of AOD Selection)**

Required of all candidates. This spreadsheet is complementary to the Teaching Portfolio. Use the Excel template on the Promotion and Tenure link on the Office of Faculty Affairs website to list intramural and extramural teaching activities. Modify the template as needed to highlight your educational activities as a faculty member. For teaching on a recurring basis, list single entries with multiple dates listed within each entry.

## **Grant Funding Spreadsheet (Required of all candidates regardless of AOD selection)**

Required of all candidates. The Grant Funding Spreadsheet is a critical component of every AOD where intramural or extramural funding is requested to support research (R01, R21, pilot grants, etc.), education and mentoring (T32, etc.), clinical trials, or administrative/service roles. A complete 5-year record of funding is required. Candidates with current and/or past grant funding should complete this spreadsheet with the requested information. Use the Excel template available on the Faculty Affairs website.

## **Clinician Portfolio (Required of all Clinicians)**

Up to 20 pages only. This portfolio should be included for any candidate utilizing the Clinical and Patient Care AOD as one of their promotion categories. This portfolio should be combined into a single PDF file rather than a collection of numerous files. These materials should highlight the candidate's clinical activities and



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accomplishments. Allow plenty of time to compile the necessary documents and information to highlight the candidate's accomplishments. Additional information about this portfolio is available in Appendix B (see below).

## **Department Chair's Letter**

The Department Chair letter is a critical component in the candidate's promotion application. This letter should discuss the notable strengths of the application and acknowledge the candidate's career progression. The Department Chair's letter should also focus specific attention to the elements that support a regional reputation (for promotion to Associate Professor) and national reputation (for promotion to Professor). This letter will be submitted by the Department Chair or a Department Chair delegate on the candidate's behalf to the Committee on Promotion and Tenure.

## **Departmental Promotions Committee Letter**

The department's internal Promotion and Tenure Committee is also a critical component in the candidate's application. This letter should represent a consensus evaluation of the candidate's application for promotion along with an assessment of their regional and/or national reputation. The complete promotion portfolio should be provided to the chair of the department's P&T Committee early enough so that the committee will have adequate time to prepare this letter on the candidate's behalf. This letter will be submitted on the candidate's behalf to the Committee on Promotion and Tenure.

## **External Evaluator List**

Starting in 2025, internal letters of reference or evaluations are no longer necessary. During the application process, the candidate will electronically submit a list of external evaluators to the Office of Faculty Affairs using the link in Mountain Pass. For each evaluator, the following information should be included:

1. The evaluator's name
2. The evaluator's degree
3. The evaluator's academic rank
4. The evaluator's institution
5. The evaluator's current email address
6. The evaluator's relationship to the candidate

It is advisable to consider contacting potential evaluators ahead of time to make sure you have included individuals likely to provide an evaluation and to confirm the contact information. Below are the guidelines for number of evaluators needed and how to select the evaluators.

- a. Associate Professor: All external evaluations must be written by faculty at the rank of Associate Professor or higher. No fewer than 3 external evaluations must be received. Candidates should therefore submit names of at least 5 external evaluators at the time of the promotion application.
- b. Professor: All external evaluations must be written by faculty at the rank of Professor. No fewer than 5 external evaluations must be received. Candidates should submit names of at least 8 external evaluators at the time of the promotion application. At least 2 of the external evaluations should be from individuals with whom the candidate has never directly worked with.
- c. External evaluators should be familiar with the candidate's work in the Areas of Distinction in order to adequately evaluate the candidate's accomplishments. For candidates for Associate Professor, the evaluators must evaluate the candidate's recognition at the regional level. For candidates for Professor, the evaluators must evaluate the candidate's recognition at the national and/or international level.
- d. Evaluators should not be colleagues, scientific mentors, or trainees with whom the candidate is currently conducting research or other significant professional activities or with whom the candidate has conducted such activities within three years of the date of the application. In the cases where a candidate has difficulty identifying a sufficient number of evaluators without conflicts, permission may be granted by the Senior Associate Dean for a candidate to provide the name of one mentor or close collaborator to write a letter evaluating the candidate's scholarship, as long as this individual's relationship is clearly identified.





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## **Reputation**

A crucial criterion for promotion is a candidate's established reputation within their academic discipline. Through professional recognition, research impact, collaborative efforts, leadership roles, and positive external endorsements, faculty members demonstrate reputation that is consistent to their rank. Appointment to the rank of Associate Professor requires a strong regional reputation and emerging national reputation. Appointment to Professor requires a strong national reputation, and in some cases, international reputation.

### **REPUTATION EXAMPLES FOR PROMOTION**

#### **Regional**

- Invitations to speak regionally in issues related to area of expertise.
- Leadership roles in regional professional organizations related to area of expertise, including leadership in regional courses and/or programs.
- Service on regional committees related to area of expertise.
- Service as regional consultant on issues related to area of expertise.
- Regional awards for contributions and/or innovation in the area of expertise.
- Invitations to serve on institutional peer review funding committees.

#### **National and/or International**

- Visiting professorships and invitations to speak nationally and/or internationally on issues related to area of expertise.
- Leadership roles in national and/or international professional organizations related to area of expertise, including leadership in regional courses and/or programs.
- Service on national and/or international committees related to area of expertise.
- Service as national or international consultant on issues related to area of expertise.
- National and/or international awards for contributions and/or innovation in the area of expertise.
- Invitations to serve on national or international peer review funding committees.
- Membership and leadership on national editorial boards.





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## Appendix A

### Teaching Portfolio Guidelines for Preparation

The Teaching Portfolio should provide evidence of educational accomplishments and related scholarly activities. Use this portfolio to provide a sampling of the breadth, depth, and quality of your teaching and educational work. Not all the elements listed will apply to all faculty members. Faculty members with expectations for significant accomplishments in this area should use this portfolio to highlight exemplary performance.

**Length:** This portfolio is a single PDF file of no more than 30 pages.

**Organization:** Consider a Table of Contents with a short summary of each section on the first page of your portfolio. This can help guide reviewers to better understand the significance of the materials you have chosen to include. Faculty may also choose to label some pages or sections to more clearly designate the information presented.

#### **Elements to Include in the Portfolio:**

1. **Teaching Evaluations** – Include teaching evaluations or other objective evidence of teaching performance that you have received for intramural and extramural presentations and activities. It is highly recommended to include evaluations from multiple different learner groups (e.g., medical students, graduate students, resident physicians, fellows, practicing physicians, etc). Provide this information in summary form by learner type and year, or by individual teaching event rather than providing individual participant feedback forms. The review committee prefers evaluations for teaching events that you include as examples of instructional materials (see #3).
2. **Narrative Summary of Educational Activities** – When appropriate, faculty candidates are permitted to include narrative descriptions of significant teaching and educational accomplishments that are not well represented elsewhere in the submitted materials.
3. **Examples of Instructional Materials** – Include examples of teaching materials that were created and used by you in your educational activities. Preference should be given for materials you have used and also received teaching evaluations that are included in this portfolio (see above). These may include items such as course syllabi, lecture outlines, small group cases, and other curricular materials. Examples of your PowerPoint slides are not required. If you choose to include such examples of slides, include no more than 2 examples of lectures and be sure to stay within the overall page limit for the entire portfolio.



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## Appendix B

### Clinician Portfolio Guidelines for Preparation

The Clinician Portfolio should provide evidence of clinical accomplishments and related scholarly activities. Use this portfolio to provide a sampling of the breadth, depth, and quality of your clinical work. Not all elements will apply to all faculty.

Use this portfolio to demonstrate 3 important aspects of your clinical work:

1. How have you demonstrated exemplary clinical practice in your discipline?
2. What significant contributions have you made to develop your specialty?
3. How have you demonstrated professional innovation in your clinical work?

**Length:** This portfolio is a single PDF file of no more than 20 pages.

**Organization:** Consider a Table of Contents with a short summary of each section on the first page of your portfolio. This can help guide reviewers to better understand the significance of the materials you have chosen to include. Faculty may also choose to label some pages or sections to more clearly designate the information presented.

Elements promotion candidates may want to include are categorized below. Not all categories will be applicable to all candidates.

1. **Summary of Clinical Activities** – All candidates should describe current and recent professional effort allocation to clinical activities, using outline or short narrative. Include activities that promote patient-centered care, efficiency, or operations.
2. **Assessments of Clinical Work** – All candidates should include patient evaluation data such as Press-Ganey reports, service excellence awards, or other evaluations of patient care. This may include personal and/or team performance in internal and external benchmarks for quality of care. Include other evidence of clinical excellence, as appropriate.
3. **Clinical Administrative Leadership** – faculty will provide evidence of excellence as a leader for clinical care activities. Roles may include serving as a medical director, clinical operations leader, or other ongoing and regular patient care related leadership positions. Feedback and assessments from team members, such as 360-degree evaluations, are highly valued to provide evidence of strong leadership. Include information about success of these activities and how the candidate's leadership contributed to them.
4. **Departmental or Institutional Committee Leadership** - faculty will serve in leadership roles for medical center and/or professional society committees and task forces annually. Evidence of accomplishments, significant initiatives, and outcomes in these roles is highly valued. Include details for role(s) the candidate has played in accomplishments
5. **Patient Care and Quality Improvement Materials** – Where applicable, include examples of quality improvement materials you created or initiatives in which you played an important role. Describe the project and your role in implementation and evaluation. Emphasize outcomes and demonstrated effectiveness.
6. **Patient Care Process Improvement** – faculty will create and/or play a documented key role in



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implementing creative patient care processes or clinical pathways. Evidence of effectiveness and annual assessment of success are highly valued

7. **Clinical Policy Development** – Where applicable, describe clinical policies or procedures that you created or implemented. Provide examples, outcomes, and evidence of effective implementation.
8. **Healthcare Innovations** – faculty will demonstrate creative accomplishments that lead to patents, medical device development, new therapeutics, nontraditional teaching methods or healthcare/public health content delivery, or other innovative approaches that improve health. This may include supportive roles in team science that may not otherwise be considered traditional scholarship that has been formally peer-reviewed. Grant funded professional activities that support the clinical mission of our health system are highly valued and may include extramural support of new clinical programs, innovative educational efforts, and/or other funded patient care initiatives.
9. **Clinical Outreach Activities** - faculty members will lead regular medical center outreach events, regularly appear in media to represent the medical center, and/or publish written materials disseminated outside of our health system that support the positive reputation of our institution each year.
10. **Advocacy Efforts** - faculty will provide evidence of significant participation and leadership in state and/or national advocacy efforts related to healthcare and/or academic medicine, including medical education and research, documented annually. Include documentation of outcomes, successful initiatives, and details about how the candidate contributed to these efforts
11. **Unsolicited Letters** – You may include representative samples of unsolicited letters from grateful patients or other individuals recognizing your outstanding clinical accomplishments or compassionate care. Be sure to remove any identifying patient information before including them in your portfolio. Keep the number of examples limited to stay within the 20-page limit.



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## Appendix C

### Four Areas of Distinction

Promotion on the Non-Tenure Track has been designed to capture the uniqueness of each faculty as they transition through their career at WFUSM. Promotion will be granted to those Non-Tenure Track faculty who demonstrate continued career growth in two to three Areas of Distinctions. Since time in rank is not a determinant for promotion timing, faculty should reach out to mentors, their Department Chair and their Department Promotion and Tenure Committee to determine whether they have made considerable progress in their chosen Areas of Distinction. Keep in mind that through their career, a faculty member may change their career focus and objectives, and thus the Area of Distinction domain may change as they progress from Assistant Professor through the rank of Associate Professor, and finally to the rank of Professor.

#### **Scholarly Activity on the Non-Tenure Track**

For faculty on the Non-Tenure Track, scholarly productivity and dissemination is expected in one AOD and should support a strong regional reputation (promotion to Associate Professor) or a strong national reputation (promotion to Professor). If the candidate selects the **two AOD option** (see below), scholarly productivity and dissemination should be demonstrated in the “Achievement of Excellence” AOD. Scholarly productivity and dissemination in a “Significant Contribution AOD” will be taken into consideration as a positive promotion factor.

If the **three AOD option** (see below) is selected, scholarly productivity and dissemination should be demonstrated in one of the three AODs. Scholarly productivity and dissemination in other two “Significant Contribution AODs” will be taken into consideration as a positive promotion factor.

If the “Achievement of Excellence AOD” is Service and Administration, scholarly productivity and dissemination in the “Significant Contribution AOD” will be taken into consideration as a positive promotion factor to support the candidate’s regional or national reputation.

**Scholarly Productivity and Dissemination (see Appointment, Promotion and Tenure Policy Appendix C Promotion Factors):** Scholarly productivity is evaluated based on the contribution, creation, and dissemination of scholarly academic products. These include publications in peer-reviewed scholarly journals, non-peer-reviewed publications, editorially reviewed book chapters and electronic topic reviews, presentations at regional and national meetings, and other examples of scholarship that have been created and disseminated. Significant accomplishments in this area are valued on all promotion tracks.

- a. **Publication Numbers:** The number of peer-reviewed publications and the quality of journals in which faculty member publications appear are both important criteria for evaluating scholarship. The typical number of publications for Non-Tenure Track candidates at each level of promotion may differ depending on the candidate’s discipline, expertise and experience. Quality may be judged by the P&T Committee based upon the stature of the journal in which the work is published, the number of citations, or other measures to be determined by the committee.
- b. **Authorship:** “First Author” refers to the candidate being listed first in a multi-authored publication. “Senior Author” refers to the candidate being listed last on a multi-authored publication. It is recognized that journals and specialty disciplines vary in their authorship hierarchy. Candidates should note when other authorship positions may indicate senior responsibility for a published work. The faculty member has the opportunity to highlight particular scholarly contributions in a personal narrative statement. WFUSM recognizes and values the participation of faculty in collaborative research. Authorship that is not “first” or “senior” may still be highly regarded in the evaluation of a candidate. The personal narrative is a means by which the faculty member may indicate the individual’s contributions in collaborative, multi-author publications.
- c. Characteristics of high-quality scholarship include:



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- 1) Original
  - 2) Independent, or, if the faculty member is engaged in collaborative work, of such a nature that the faculty member's contribution to the scholarly work is significant in the design, analysis, context and dissemination of the scholarly work
  - 3) Important in developing new knowledge
  - 4) Recognized by peers
  - 5) Peer-reviewed
- d. The stature of the scholarship is judged by the following:
- 1) A sustained history of peer-reviewed and non-peer-reviewed publications in respected journals (or equivalent scholarly dissemination). Quality of the publications may be evaluated by citations, "impact factor," or stature of the journal within the field.
  - 2) Peer recognition, as demonstrated by invited participation in major academic meetings; invited authorship of books, monographs, book chapters and critical reviews; the receipt of honors for academic achievements.
  - 3) Letters by peers in the faculty member's field evaluating the specific contributions of the individual, the importance of her/his contributions, and an assessment of the faculty member's stature within the academic community.
  - 4) A personal narrative, describing the individual faculty member's contribution to scholarship, especially describing the faculty member's contributions when scholarly products are reflected in multi-author publications in which the faculty member is not the first or senior author.

## Areas of Distinction

There are four Areas of Distinction (AOD) utilized for promotion evaluation of faculty on the Non-Tenure Track:

- ***Investigation and Inquiry***
- ***Clinical and Patient Care***
- ***Teaching and Mentoring***
- ***Service and Administration***

The following descriptions of the AODs and the associated Tables below are meant to be guides to assess a candidate's progress towards promotion to Associate Professor and Professor. ***Given the uniqueness of faculty members, these descriptions and Tables are not meant to be an exhaustive list of review criteria.*** At WFUSM, all candidates are holistically reviewed, and their uniqueness considered during promotion evaluation. Reviewers on the Committee for Promotion and Tenure are discouraged from making direct comparisons during their assessments to honor the uniqueness of each candidate's career trajectory.



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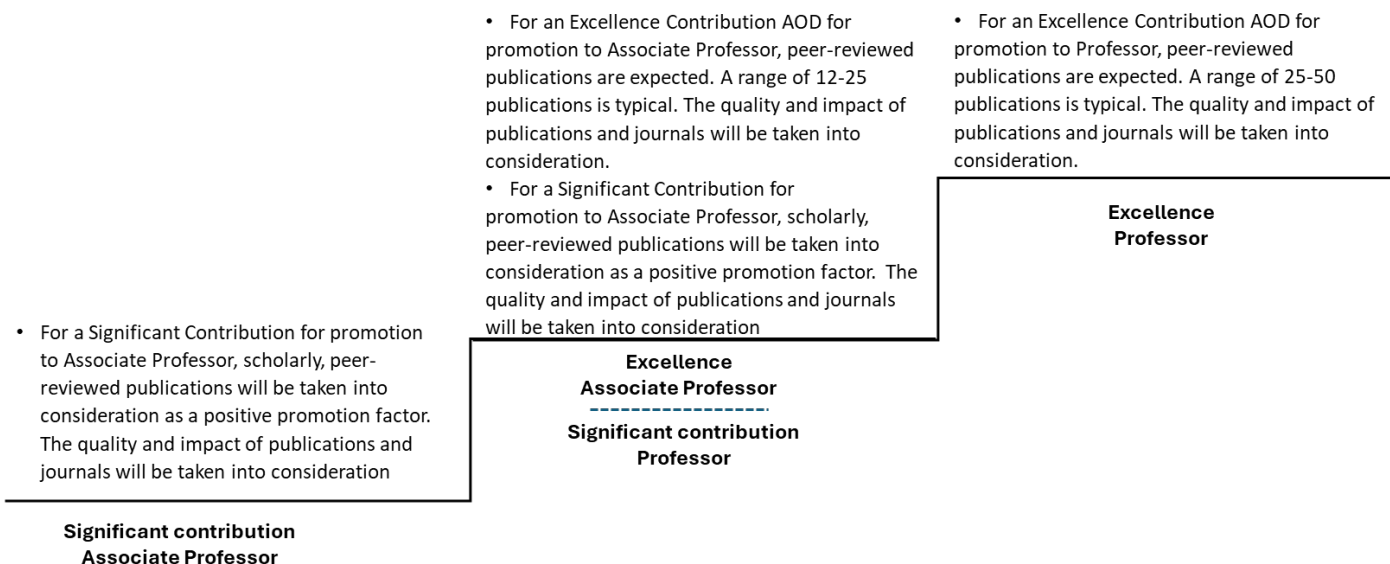
## Investigation and Inquiry Area of Distinction

The Investigation and Inquiry Area of Distinction is most appropriate for individuals who spend a significant portion of their time performing research. Wake Forest University has adopted the definition of research as a systematic investigation (including research development, testing and evaluation) designed to contribute to generalizable knowledge (45 CFR §46.102). This includes basic, translational and clinical research, including epidemiology, outcomes and health services research, and biostatistics, as well as research in social sciences, ethics, bioinformatics and health economics, among others. The Investigation and Inquiry AOD recognizes the contributions of individuals with research training in diverse fields who bring a unique or critical expertise to the School of Medicine. It includes individuals participating in large collaborative and multicenter research, as well as those conducting research individually or in small groups.

Faculty declaring Investigation and Inquiry Area of Distinction as a determinant for promotion will generally be identified as:

- 1) **Faculty with an independently funded research program.** In this case, the faculty member should demonstrate independent and continuous external funding and have high-quality first or senior author publications.
- 2) **Faculty that makes a significant contribution to team science.** Although the candidate may not be Principal Investigator on externally funded grants, the faculty must demonstrate they are an essential member of an established research team. In this case, significant contribution to team science can be demonstrated by inclusion on high-quality publications as first or contributing author and inclusion as a Co-investigator on external funding.
- 3.) **Faculty that makes a significant contribution through management of a core laboratory or research center.** In this case, the faculty must demonstrate a specific technical skill or expertise essential to core laboratory operation; contributions to multiple research programs; inclusion on high-quality publications as contributing author; inclusion as a Co-investigator on external funding; and receiving external grants to operate a core lab.

## Example of Progression in Investigation and Inquiry AOD:





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Table 1 Investigation and Inquiry AOD Examples			
Milestone Category	Significant Contribution Associate Professor	Excellence Associate Professor/ Significant Contribution Professor	Excellence Professor
<b>Scholarly Productivity</b>	<ul style="list-style-type: none"> <li>For Significant Contribution AOD for promotion to Associate Professor, scholarly, peer-reviewed publications will be taken into consideration as a positive promotion factor. The quality and impact of publications and journals will be taken into consideration.</li> <li>Presentations at regional professional meetings</li> <li>Invited speaker at regional institution.</li> <li>Peer reviewer for journal in field of expertise</li> </ul>	<ul style="list-style-type: none"> <li>For an Excellence Contribution AOD for promotion to Associate Professor, peer-reviewed publications are expected. A range of 12-25 publications is typical. The quality and impact of publications and journals will be taken into consideration.</li> <li>For Significant Contribution AOD for promotion to Professor: Scholarly, peer-reviewed publications will be taken into consideration as a positive promotion factor. The quality and impact of publications and journals will be taken into consideration.</li> <li>Presentations at national professional meetings</li> <li>Growing list as Invited speaker at national institutions</li> <li>Peer reviewer for multiple journals in field of expertise</li> <li>Selection to editorial board of a journal in field of expertise</li> <li>Author of book chapter</li> </ul>	<ul style="list-style-type: none"> <li>For an Excellence Contribution AOD for promotion to Professor, peer-reviewed publications are expected. A range of 25-50 publications is typical. The quality and impact of publications and journals will be taken into consideration.</li> <li>Presentations at national and international professional meetings</li> <li>A substantial list as invited speaker at national or international institutions</li> <li>Peer reviewer for multiple journals</li> <li>Selection to editorial board <u>or</u> as the editor of a journal in field of expertise</li> <li>Author of text book or editor of a text book</li> </ul>
<b>Research Excellence</b>	<ul style="list-style-type: none"> <li>External funding as Principal Investigator, Co-Principal Investigator Co-Investigator, Site Principal Investigator on <u>at least one</u> NIH, NSF, Foundation or similar external sources</li> <li>Recipient of institutional funding as Co-Investigator or Collaborator</li> <li>Recipient of regional or institutional awards for research</li> </ul>	<ul style="list-style-type: none"> <li>External funding as Principal Investigator, Co-Principal Investigator Co-Investigator, Site Principal Investigator of <u>more than one</u> NIH, NSF, Foundation or similar external sources</li> <li>Recipient of institutional funding as Principal Investigator, Co-Principal Investigator or Co-Investigator</li> <li>Recipient of regional or national awards for research</li> </ul>	<ul style="list-style-type: none"> <li>Sustained external funding as Principal Investigator, Co-Principal Investigator Co-Investigator, Site Principal Investigator of <u>more than one</u> NIH, NSF, Foundation or similar external sources.</li> <li>Recipient of institutional funding as Principal Investigator, Co-Principal Investigator or Co-Investigator</li> <li>Recipient of national or international awards for research</li> </ul>
<b>Team Science</b>	<ul style="list-style-type: none"> <li>Membership in team science</li> <li>Member of Core Lab team</li> </ul>	<ul style="list-style-type: none"> <li>Leadership of team Science</li> <li>Directorship of Core laboratory</li> </ul>	<ul style="list-style-type: none"> <li>Long-term Leadership of team Science</li> <li>Long-term Directorship of Core laboratory</li> </ul>
<b>Industry Trial Participation</b>	<ul style="list-style-type: none"> <li>Serve as a site PI or sub-investigator for at least 1 industry-sponsored clinical trials.</li> <li>Achieve 100% or greater of participant enrollment targets for at least 1 trials.</li> <li>Meet or exceed goals for recruiting participants from diverse backgrounds</li> </ul>	<ul style="list-style-type: none"> <li>Serve as a site PI or sub-investigator for at least 3 industry-sponsored clinical trials.</li> <li>Achieve 100% or greater of participant enrollment targets for at least 2 trials.</li> <li>Consistently meet or exceed goals for recruiting participants from diverse backgrounds</li> </ul>	<ul style="list-style-type: none"> <li>Serve as the lead Advocate Health PI for at least 5 industry-sponsored trials, including one multi-site network trial.</li> <li>Lead site performance rankings (e.g., top recruiter, highest participant diversity, best retention) in at least 3 trials</li> </ul>
<b>Research Mentorship</b>	<ul style="list-style-type: none"> <li>Mentor at least 1 junior investigator or research staff member in industry-sponsored trials.</li> </ul>	<ul style="list-style-type: none"> <li>Mentor at least 2 junior investigator or research staff member in industry-sponsored trials</li> </ul>	<ul style="list-style-type: none"> <li>Mentor at least 3 faculty or staff members to engage in industry trials, leading to measurable success.</li> <li>Develop training materials or programs on sponsor engagement, trial budgeting, or compliance.</li> </ul>
<b>NCCT Subject Matter Expert (SME)</b>	<ul style="list-style-type: none"> <li>Serve as an SME to assist with protocol review and approvals for at least 1 annual cycles</li> </ul>	<ul style="list-style-type: none"> <li>Serve as an SME to assist with protocol review and approvals for at least 2 annual cycles</li> </ul>	<ul style="list-style-type: none"> <li>Serve as a lead SME for the therapeutic area, recruiting and overseeing other SMEs in the network</li> </ul>





# Faculty Promotion Guide for the Non-Tenure Track

(updated April 2025)

## Teaching and Mentoring Area of Distinction

**The Teaching and Mentoring Area of Distinction** is most appropriate for candidates who view education of health professions trainees and/or health professionals as their primary academic focus. Teaching activities are broadly defined as including didactic teaching of students, residents, clinical fellows, research fellows and peers; research training and mentorship; clinical teaching and mentorship; and, educational administrative or leadership roles. Wake Forest University defines mentoring as a purposeful relationship in which a more experienced person (mentor) provides guidance, feedback, and wisdom to facilitate the growth and development of a less experienced person (mentee).

A candidate will be evaluated on both the quantity and quality of teaching and mentoring activities, recognition for their performance as an educator and mentor, and on educational scholarship. The candidate should demonstrate educational scholarly productivity and dissemination, which may include peer-reviewed dissemination of one's own educational work (i.e., presentations at regional, national, or international conferences; publication of original research, literature reviews, invited or peer-reviewed book chapters on educational topics; educational material in print or other media such as web-based training modules and courses; and/or, national policy statements related to health professions education.

Faculty declaring Teaching and Mentoring Area of Distinction as a determinant for promotion will generally be identified as:

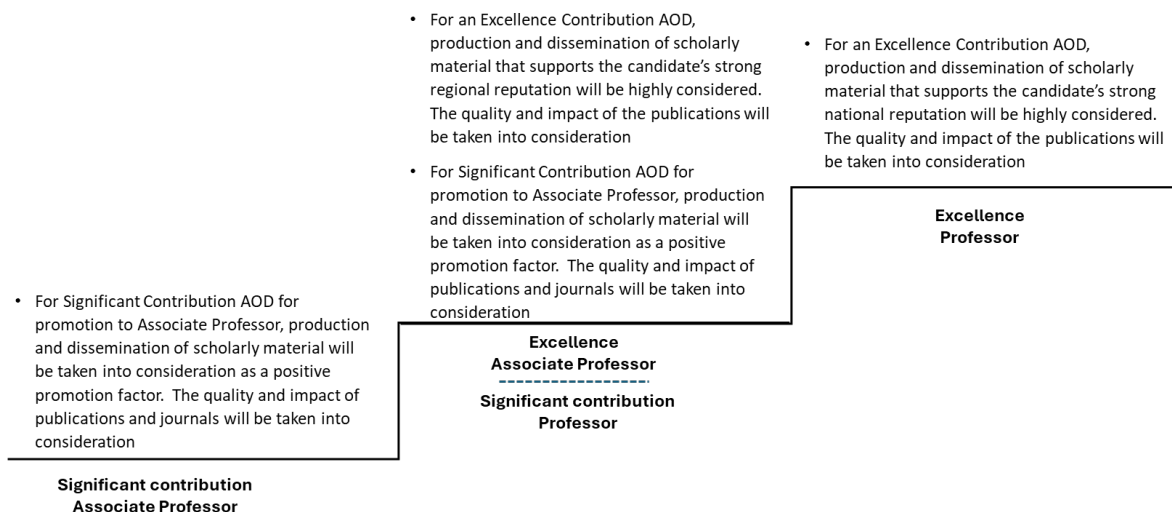
1. **Faculty who focus on the development and implementation of education programs and curricula, or in education research.** In this case, the faculty member is responsible for designing educational programs, mentoring students and residents, and conducting medical education research.
2. **Faculty who direct courses and/or rotations within the School of Medicine.** This faculty member may serve as a Clerkship Director or Course director. This role ensures that students achieve the necessary competencies in their specific area and is responsible for developing rotation schedules, coordinating with clinical sites, evaluating student performance, and ensuring that the curriculum aligns with accreditation standards.
3. **Faculty who primarily guide and support graduate students, medical students, residents, or junior faculty in their academic and professional development.** This could be through leading a formal mentorship program within the School of Medicine, serving as an advisor to learners, pairing learners with experienced faculty members to provide guidance on career planning, research opportunities, and other professional development. The faculty is deeply involved in one-on-one mentoring helping learners navigate the challenges of medical training and develop their professional identities.



# Faculty Promotion Guide for the Non-Tenure Track

(updated April 2025)

Example of Progression in Teaching and Mentoring AOD:



## Faculty Promotion Guide for the Non-Tenure Track (updated April 2025)

Table 2. Teaching and Mentoring AOD Examples			
Milestone Category	Significant Contribution Associate Professor	Excellence Associate Professor/ Significant Contribution Professor	Excellence Professor
<b>Scholarly Productivity</b>	<ul style="list-style-type: none"> <li>For Significant Contribution AOD for promotion to Associate Professor, production and dissemination of scholarly material will be taken into consideration as a positive promotion factor. The quality and impact of publications and journals will be taken into consideration.</li> <li>Contributor to a book chapter related to education/mentoring.</li> <li>Invitations to speak regionally on issues related to education.</li> <li>Reviewer for education journal</li> <li>Presentations at regional professional educator meetings</li> </ul>	<ul style="list-style-type: none"> <li>For an Excellence Contribution AOD, production and dissemination of scholarly material that supports the candidate's strong regional reputation will be highly considered. The quality and impact of publications and journals will be taken into consideration.</li> <li>For Significant Contribution AOD for promotion to Professor, production and dissemination of scholarly material will be taken into consideration as a positive promotion factor. The quality and impact of publications and journals will be taken into consideration.</li> <li>Author of a book chapter related to education/mentoring.</li> <li>Invitations to speak nationally on issues related to education.</li> <li>Reviewer for multiple education journals or service on editorial board</li> <li>Presentations at national professional educator meetings</li> </ul>	<ul style="list-style-type: none"> <li>For an Excellence Contribution AOD, production and dissemination of scholarly material that supports the candidate's strong national reputation will be highly considered. The quality and impact of publications and journals will be taken into consideration.</li> <li>Author of multiple book chapters related to education/mentoring or editor of textbook.</li> <li>Visiting professorships and invitations to speak nationally, and in some cases internationally, on issues related to education.</li> <li>Reviewer for multiple education journals or service on editorial board</li> <li>Editor of an education journal</li> <li>Presentations at national and international professional educator meetings</li> </ul>
<b>Intramural Instruction</b>	<ul style="list-style-type: none"> <li>Lecturer in WFUSM curriculum</li> <li>Participation in research training grants such as NIH T32 and T34</li> <li>Participation in residency or fellowship program</li> </ul>	<ul style="list-style-type: none"> <li>Lecturer in WFUSM curriculum or as Course Director</li> <li>Long term participation in research training grants such as NIH T32 and T34</li> <li>Clerkship Director</li> </ul>	<ul style="list-style-type: none"> <li>Graduate School Program Director</li> <li>PI of research training grants such as NIH T32 and T34</li> <li>Medical School Program Director</li> </ul>
<b>Extramural Education Activities</b>	<ul style="list-style-type: none"> <li>Service on regional committees developing guidelines and policies for education/training programs.</li> <li>Leadership role in regional courses related to education</li> </ul>	<ul style="list-style-type: none"> <li>Service on national committees developing guidelines and policies for education/training programs.</li> <li>Leadership of national courses related to education</li> </ul>	<ul style="list-style-type: none"> <li>Service on national, and in some cases international, committees developing guidelines and policies for education/training programs.</li> <li>Leadership of national and in some cases international courses related to education</li> </ul>
<b>Teaching Recognition</b>	<ul style="list-style-type: none"> <li>Awards for teaching or mentoring the department or institution</li> </ul>	<ul style="list-style-type: none"> <li>Regional awards for teaching or mentoring</li> </ul>	<ul style="list-style-type: none"> <li>National and/or international awards related to education or educational scholarship</li> </ul>
<b>Research Mentorship</b>	<ul style="list-style-type: none"> <li>Member of graduate student committee</li> <li>Sponsor graduate or medical student in research lab</li> </ul>	<ul style="list-style-type: none"> <li>Member of multiple graduate student committees or Chair</li> <li>Act as advisor to graduate or medical student for research</li> </ul>	<ul style="list-style-type: none"> <li>Continuous service on or Chair of multiple graduate student thesis committee</li> <li>Advisor to multiple graduate or medical students for research</li> </ul>



# Faculty Promotion Guide for the Non-Tenure Track

(updated April 2025)

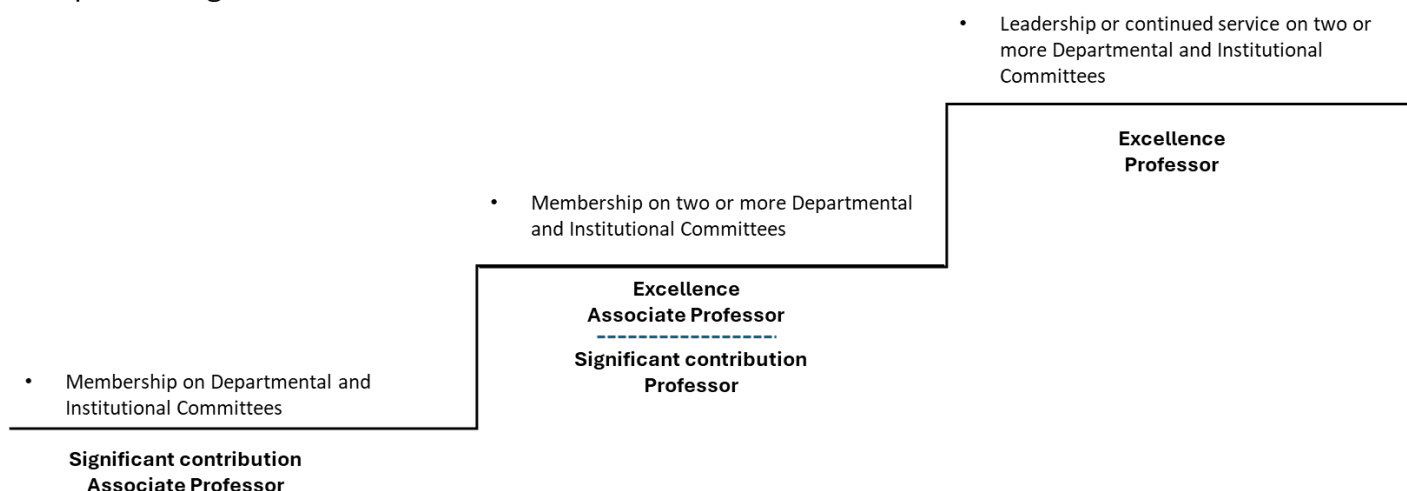
## Service and Administration Area of Distinction

The Service and Administration Area of Distinction recognizes a faculty member's demonstration of good citizenship through professional service activities in their department, the WFUSM, WFU and outside of WFU. These activities may include internal and external committees, editorial and journal reviews, grant review and study sections and membership and active participation in leading national societies of the faculty member's field.

Faculty declaring Service and Administration Area of Distinction as a determinant for promotion will generally be identified as demonstrating the following behaviors:

- 1) **Faculty who have a significant role in guiding the strategic direction of the institution, often influencing policies, culture, and the overall vision of the medical school or healthcare organization.** In this example, the faculty member is a key leader in the School of Medicine, responsible for shaping the academic strategy and overseeing the educational, research, and clinical missions of the institution. Faculty may develop or lead a leadership development program for faculty and senior administrators, aimed at building leadership capacity within the institution and promoting a collaborative leadership culture; OR,
- 2) **Faculty who focuses on activities that benefit the community, the institution, or the profession at large.** These roles often involve leadership in community outreach, public health initiatives, or service on committees that enhance the school's mission. These faculty may work closely with local organizations to address health disparities, particularly in underserved populations and may organize and lead free health clinics, health education workshops, and preventive care initiatives; OR,
- 3) **Faculty who focus on quality and ethical standards of the School of Medicine and pedagogy as a discipline.** These faculty members ensure ethical standards are upheld within the School of Medicine and affiliated hospitals and provide guidance on complex ethical issues related to patient care, research, and education. Additionally, these faculty may be heavily involved in professional organizations that set ethical guidelines and policies for the profession.

Example of Progression in Service and Administration AOD:



## Faculty Promotion Guide for the Non-Tenure Track

(updated April 2025)

Table 3. Service and Administration AOD Examples			
Milestone Category	Significant Contribution Associate Professor	Excellence Associate Professor/ Significant Contribution Professor	Excellence Professor
<b>Departmental and Institutional Administration</b>	<ul style="list-style-type: none"> <li>Membership on Departmental and Institutional Committees</li> <li>Participation on departmental faculty recruitment committees</li> </ul>	<ul style="list-style-type: none"> <li>Membership on two or more Departmental and Institutional Committees</li> <li>Participation on departmental or institutional faculty recruitment committees</li> <li>Appointment to Administrative leadership role Division Chief/Section Head</li> <li>Department Chair</li> </ul>	<ul style="list-style-type: none"> <li>Leadership or continued service on two or more Departmental and Institutional Committees</li> <li>Chair of departmental or institutional faculty recruitment committees</li> <li>Continued service as Division Chief/Section Head</li> <li>Continued service as Department Chair</li> <li>Associate Dean, Senior Associate Dean, Vice Dean</li> </ul>
<b>Service to Professional Journals</b>	<ul style="list-style-type: none"> <li>Peer reviewer for journal in field of expertise</li> </ul>	<ul style="list-style-type: none"> <li>Peer reviewer for multiple journals in field of expertise selection to editorial board of a journal in field of expertise</li> </ul>	<ul style="list-style-type: none"> <li>Peer reviewer for multiple journals, <u>or</u> selection to editorial board <u>or</u> as the editor of a journal in field of expertise</li> </ul>
<b>Extramural Grant Review</b>	<ul style="list-style-type: none"> <li>Service on regionally recognized grant review study sections (examples: North Carolina Biotech Center grants, Duke Foundation)</li> </ul>	<ul style="list-style-type: none"> <li>Service on nationally recognized grant review study sections. (examples: NIH, NSF, Foundations)</li> </ul>	<ul style="list-style-type: none"> <li>Leadership roles or service on nationally or internationally recognized grant review study sections. (examples: NIH, NSF, Foundations)</li> </ul>
<b>Extramural Recognition</b>	<ul style="list-style-type: none"> <li>Extramural service on regional advisory committee</li> </ul>	<ul style="list-style-type: none"> <li>Extramural service on multiple regional advisory committees or national advisory committees</li> </ul>	<ul style="list-style-type: none"> <li>Extramural service on multiple national advisory committees or international advisory committees</li> </ul>
<b>Professional Organization</b>	<ul style="list-style-type: none"> <li>Member of professional organization</li> <li>Presentations at regional professional educator meetings</li> </ul>	<ul style="list-style-type: none"> <li>Member of professional organization or service on professional organization committee</li> </ul>	<ul style="list-style-type: none"> <li>Leadership role in professional organization</li> </ul>
<b>Community Service</b>	<ul style="list-style-type: none"> <li>Engagement in community service projects as a representative of the medical school</li> </ul>	<ul style="list-style-type: none"> <li>Engagement in community service projects as a representative of the medical school</li> </ul>	<ul style="list-style-type: none"> <li>Leadership or having a role in establishing a community service projects as a representative of the medical school</li> <li></li> </ul>
<b>Awards</b>	<ul style="list-style-type: none"> <li>Recipient of prestigious award for service from regional organization</li> </ul>	<ul style="list-style-type: none"> <li>Recipient of prestigious award for service from national or international organization</li> </ul>	<ul style="list-style-type: none"> <li>Recipient of prestigious award for service from national or international organization</li> </ul>

# Faculty Promotion Guide for the Non-Tenure Track

(updated April 2025)

## Clinical and Patient Care Area of Distinction

The Clinical and Patient Care Area of Distinction recognizes faculty members for whom patient care and other clinically related activities constitute the unifying theme for the candidate's academic activities and achievements. The candidate may have a reputation as an innovator in approaches to diagnosis, treatment or prevention of disease, applications of technology to clinical care and/or in developing models of care delivery. With specific regard to clinical excellence and leadership, an assessment will be performed regarding both the candidate's recognition as a clinical expert as well as the candidate's influence on clinical practice. The candidate should demonstrate scholarly productivity and dissemination, which may include chapters and reviews in clinical expertise, guidelines for patient care, publications evaluating the impact of a clinical innovation and/or other publications that supports the candidate's regional or national reputation.

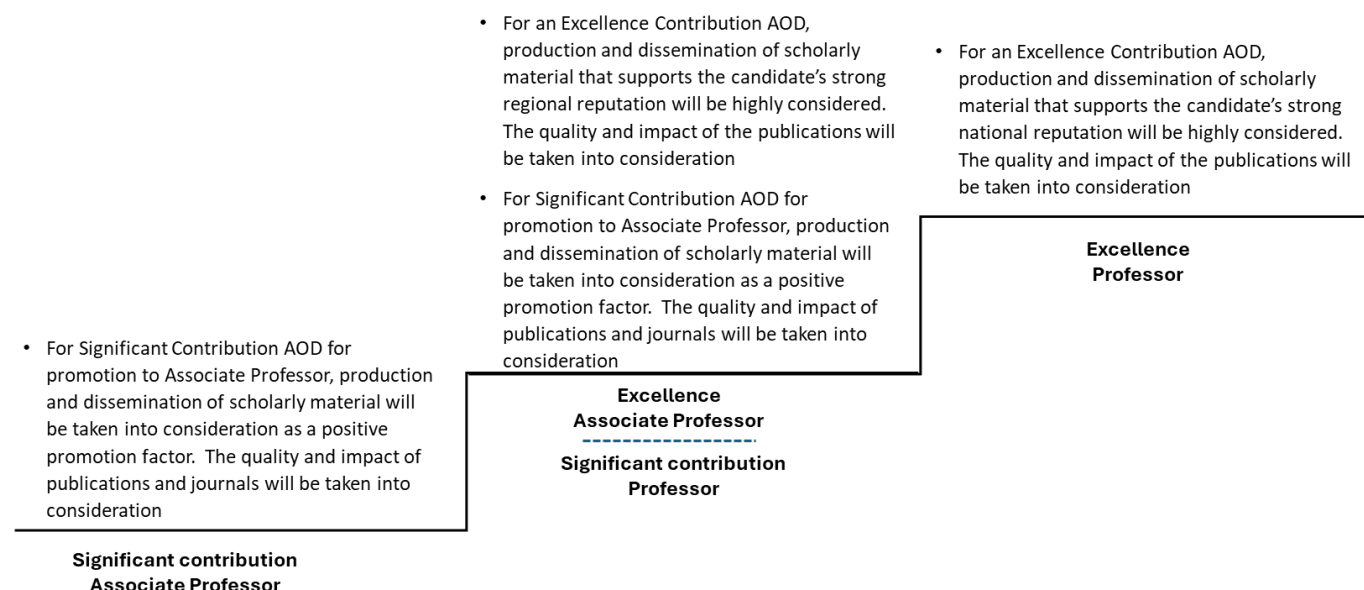
Faculty declaring Clinical and Patient Care Area of Distinction as a determinant for promotion will generally be identified as:

- **Faculty with an established clinical and patient care program.** In this case, the faculty member's primary focus is on exemplary clinical care, unique areas of emphasis in patient management, or outstanding service to a Department, the School of Medicine, and Wake Forest University.

In addition, the Clinical and Patient Care AOD may include:

- 1) **Faculty that makes a significant contribution to team clinical and patient care and clinical research.** This faculty member reflects excellence in translational science, clinical research and health services (e.g., health care policy and comparative effectiveness research) as measured by publications and grant funding, respectively.
- 2) **Faculty that makes a significant contribution through clinical teaching.** In this case, contribution reflects pedagogic excellence as measured by teaching evaluations and innovative teaching practices, modules and publications. In addition, faculty will add value to the School of Medicine by providing essential activities that advance the missions of WFUSM and Wake Forest University.

### Example of Progression in Clinical and Patient Care AOD:



## Faculty Promotion Guide for the Non-Tenure Track (updated April 2025)

Table 4. Clinical and Patient Care AOD Examples			
Milestone Category	Significant Contribution Associate Professor	Excellence Associate Professor/ Significant Contribution Professor	Excellence Professor
<b>Scholarly Productivity</b>	<ul style="list-style-type: none"> <li>For Significant Contribution AOD for promotion to Associate Professor, production and dissemination of scholarly material will be taken into consideration as a positive promotion factor. The quality and impact of publications and journals will be taken into consideration.</li> <li>Contributor to a book chapter on clinical care</li> <li>Reviewer for clinically focused journal</li> <li>Presentations at regional professional medical meetings</li> </ul>	<ul style="list-style-type: none"> <li>For an Excellence Contribution AOD, production and dissemination of scholarly material that supports the candidate's strong regional reputation will be highly considered. The quality and impact of publications and journals will be taken into consideration.</li> <li>For Significant Contribution AOD for promotion to Professor, production and dissemination of scholarly material will be taken into consideration as a positive promotion factor. The quality and impact of publications and journals will be taken into consideration.</li> <li>Author of a book chapter on clinical care</li> <li>Reviewer for multiple clinically focused journal or service on editorial board</li> <li>Presentations at national professional medical meetings</li> </ul>	<ul style="list-style-type: none"> <li>For an Excellence Contribution AOD, production and dissemination of scholarly material that supports the candidate's strong national reputation will be highly considered. The quality and impact of publications and journals will be taken into consideration.</li> <li>Author of multiple book chapters on clinical care</li> <li>Reviewer for clinically focused journal or service on editorial board</li> <li>Editor of a clinically focused journal</li> <li>Presentations at national and international professional medical meetings</li> </ul>
<b>Clinical Productivity/Evaluations</b>	<ul style="list-style-type: none"> <li>Consistently achieved yearly RVU goal</li> <li>Received highly positive patient evaluations</li> </ul>	<ul style="list-style-type: none"> <li>Consistently exceeded RVU goal</li> <li>Consistently received highly positive patient evaluations</li> </ul>	<ul style="list-style-type: none"> <li>Outstanding achievement in exceeding RVU goal</li> <li>Maintained a career of achieving highly positive patient evaluations</li> </ul>
<b>Clinical Innovation/Protocol Development</b>	<ul style="list-style-type: none"> <li>Developed documentation, innovative patient care or new techniques or breakthroughs implemented at the Department level</li> </ul>	<ul style="list-style-type: none"> <li>Developed documentation, innovative patient care or new techniques or breakthroughs implemented within Advocate</li> </ul>	<ul style="list-style-type: none"> <li>Developed documentation, innovative patient care or new techniques or breakthroughs implemented at other institutions nationally or internationally</li> </ul>
<b>Board Certification</b>	<ul style="list-style-type: none"> <li>Continually maintaining board certifications</li> </ul>	<ul style="list-style-type: none"> <li>Achieving additional board certifications</li> </ul>	<ul style="list-style-type: none"> <li>Achieving additional board certifications</li> </ul>
<b>Medical Education</b>	<ul style="list-style-type: none"> <li>Development of new medical education material or curriculum used institutionally</li> </ul>	<ul style="list-style-type: none"> <li>Develop of new medical education material or curriculum used regionally</li> </ul>	<ul style="list-style-type: none"> <li>Development of new medical education material or curriculum used nationally</li> </ul>
<b>Professional Medical Organizations</b>	<ul style="list-style-type: none"> <li>Membership(s) in medical professional organizations</li> </ul>	<ul style="list-style-type: none"> <li>Committee leadership in professional organizations</li> </ul>	<ul style="list-style-type: none"> <li>Leadership role in professional organization</li> </ul>
<b>Recognition of Clinical Expertise</b>	<ul style="list-style-type: none"> <li>Invited to speak regionally related to clinical expertise</li> <li>Membership on regional advisory committee</li> </ul>	<ul style="list-style-type: none"> <li>Invited to speak nationally related to clinical expertise</li> <li>Membership on national advisory committee</li> </ul>	<ul style="list-style-type: none"> <li>Visiting professorships and invitations to speak nationally, and in some cases internationally, on issues related to clinical expertise</li> <li>Leadership on national advisory committee or membership on international advisory committee</li> </ul>
<b>Departmental and Institution Medical Committees</b>	<ul style="list-style-type: none"> <li>Service on departmental medical committees.</li> </ul>	<ul style="list-style-type: none"> <li>Service on institutional medical committees or Chair of departmental medical committees</li> </ul>	<ul style="list-style-type: none"> <li>Chair of Institutional medical committees</li> </ul>