SUMMARY OF CRITERIA FOR, PROMOTION, APPOINTMENT, TENURE, AND PERIODIC CAREER REVIEW
(Effective January 1, 2012)

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Note: The requirements for part-time faculty in the School of Medicine shall be the same as those for full-time faculty. It is recognized that the responsibilities of the faculty in this category may differ from those with full-time appointments.

This document is intended as a summary only and is not to be used to replace the criteria in the Promotion, Appointment, and Tenure (PAT) document. Please consult the entire PAT document on the Faculty Affairs website: http://louisville.edu/medschool/facultyaffairs/policies.html
Research - Associate Professor (Term): Candidate must demonstrate excellence in research proficiency in the additional areas of their work assignment, and scholarly activity.

Excellence in Research
- major responsibility for an independent research program (e.g. principal investigator on a grant) or a documented leadership role in a collaborative research effort (principal investigator on a multi-principal investigator grant)
- regular publication (on average, at least annually) in peer-reviewed media as a major author
- current extramural funding: federal funding as principal investigator including principal investigator on a multi-principal investigator grant is preferred. Nationally peer-reviewed funding as principal investigator will be acceptable if evidence of recent submission and resubmission to federal sources is provided or it can be documented that federal funding is generally unavailable for a specific research area
- entrepreneurial research funding requires a leadership role in acquiring federal peer-reviewed grants or contracts for technology development linked, and of demonstrable value, to UofL
- the successful acquisition of patents, although dissemination in peer-reviewed media is preferred and must constitute the majority of the documentation of peer acceptance.
- reviews of the research via extramural letters must support the rating of excellence

Proficiency in Teaching
- documented teaching assignment. Teaching includes activities that foster learning and critical thinking skills. Examples of direct teaching include lectures, workshops, small group facilitation, precepting, demonstration of procedural skills, and facilitation of on-line courses
- evidence of proficiency may include structured mentoring, advising activities, developing new instructional or curricular materials, evidence of learning, and participating in interdisciplinary teaching efforts.
- Satisfactory supervisory, peer, and trainee reviews

Proficiency in Service
- documented clinical assignment
- satisfactory peer and supervisory reviews of the clinical service
- reviews by referring physicians and patient satisfaction surveys may also be obtained to document proficiency
- community service must involve medical and/or basic science expertise. Evidence of significantly increased clinical-service-related collaborative partnerships with the community may be presented as a supplement

Scholarly Activity – See page 14
Research - Professor (Term): Candidate must demonstrate **excellence** in research, **proficiency** in the additional areas of their work assignment, and **scholarly activity**.

**Excellence in Research**
- major responsibility for an independent research program (e.g. principal investigator on a grant) or a documented leadership role in a collaborative research effort (principal investigator on a multi-principal investigator grant)
- regular publication (on average, at least annually) in peer-reviewed media as a major author
- current extramural funding: federal funding as principal investigator including principal investigator on a multi-principal investigator grant is preferred. Nationally peer-reviewed funding as principal investigator will be acceptable if evidence of recent submission and resubmission to federal sources is provided or it can be documented that federal funding is generally unavailable for a specific research area
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- the successful acquisition of patents, although dissemination in peer-reviewed media is preferred and must constitute the majority of the documentation of peer acceptance
- reviews of the research via extramural letters must support the rating of excellence
- **for promotion to professor**: sustained, renewed, federal funding as principal investigator is required. If it can be documented that federal funding is generally unavailable for a specific research area, the preferential requirement may be fulfilled through substantial national peer-reviewed funding. Publications must be in a high quality, high visibility journal in the field

**Proficiency in Teaching**
- documented teaching assignment. Teaching includes activities that foster learning and critical thinking skills. Examples of direct teaching include lectures, workshops, small group facilitation, precepting, demonstration of procedural skills, and facilitation of on-line courses
- evidence of proficiency may include structured mentoring, advising activities, developing new instructional or curricular materials, evidence of learning, and participating in interdisciplinary teaching efforts.
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- documented clinical assignment
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- community service must involve medical and/or basic science expertise. Evidence of significantly increased clinical-service-related collaborative partnerships with the community may be presented as a supplement

**Scholarly Activity** – See page 14
Research - Associate Professor (Tenure Track): Candidate must demonstrate excellence in research, proficiency in the additional areas of their work assignment, and scholarship in one area.

**Excellence in Research**
- major responsibility for an independent research program (e.g. principal investigator on a grant) or a documented leadership role in a collaborative research effort (principal investigator on a multi-principal investigator grant)
- regular publication (on average, at least annually) in peer-reviewed media as a major author
- current extramural funding: federal funding as principal investigator including principal investigator on a multi-principal investigator grant is preferred. Nationally peer-reviewed funding as principal investigator will be acceptable if evidence of recent submission and resubmission to federal sources is provided or it can be documented that federal funding is generally unavailable for a specific research area
- entrepreneurial research funding requires a leadership role in acquiring federal peer-reviewed grants or contracts for technology development linked, and of demonstrable value, to UofL
- the successful acquisition of patents, although dissemination in peer-reviewed media is preferred and must constitute the majority of the documentation of peer acceptance.
- reviews of the research via extramural letters must support the rating of excellence

**Scholarship in Research**
- innovations in research (discovery of new findings or application of existing findings in a new way) are expected
- dissemination and documentation of peer acceptance must be through traditional peer-review publications
- extramurally-funded research program
- present research findings, on average annually, at national forums
- for tenure review: an emerging regional/national recognition in a focused area of research expertise that is evidenced in extramural letters

**Proficiency in Teaching**
- documented teaching assignment. Teaching includes activities that foster learning and critical thinking skills. Examples of direct teaching include lectures, workshops, small group facilitation, precepting, demonstration of procedural skills, and facilitation of on-line courses
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**Proficiency in Service**
- documented clinical assignment
- satisfactory peer and supervisory reviews of the clinical service
- reviews by referring physicians and patient satisfaction surveys may also be obtained to document proficiency
- community service must involve medical and/or basic science expertise. Evidence of significantly increased clinical-service-related collaborative partnerships with the community may be presented as a supplement
Research - Tenured Professor: Candidate must demonstrate **excellence** in research, **proficiency** in the additional areas of their work assignment, and **scholarship** in one area.

**Excellence in Research**
- major responsibility for an independent research program (e.g. principal investigator on a grant) or a documented leadership role in a collaborative research effort (principal investigator on a multi-principal investigator grant)
- regular publication (on average, at least annually) in peer-reviewed media as a major author
- current extramural funding: federal funding as principal investigator including principal investigator on a multi-principal investigator grant is preferred. Nationally peer-reviewed funding as principal investigator will be acceptable if evidence of recent submission and resubmission to federal sources is provided or it can be documented that federal funding is generally unavailable for a specific research area
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**Scholarship in Research**
- innovations in research (discovery of new findings or application of existing findings in a new way) are expected
- dissemination and documentation of peer acceptance must be through traditional peer-review publications
- extramurally-funded research program
- present research findings, on average annually, at national forums
- **for promotion to professor**: national/international recognition in a focused area of research expertise that is evidenced by leadership roles in national forums, consultations such as being an editor or reviewer, or invitations to speak. The national/international recognition should be evidenced in extramural letters

**Proficiency in Teaching**
- documented teaching assignment. Teaching includes activities that foster learning and critical thinking skills. Examples of direct teaching include lectures, workshops, small group facilitation, precepting, demonstration of procedural skills, and facilitation of on-line courses
- evidence of proficiency may include structured mentoring, advising activities, developing new instructional or curricular materials, evidence of learning, and participating in interdisciplinary teaching efforts.
- Satisfactory supervisory, peer, and trainee reviews

**Proficiency in Service**
- documented clinical assignment
- satisfactory peer and supervisory reviews of the clinical service
- reviews by referring physicians and patient satisfaction surveys may also be obtained to document proficiency
- community service must involve medical and/or basic science expertise. Evidence of significantly increased clinical-service-related collaborative partnerships with the community may be presented as a supplement
Service - Associate Professor (Term): Candidate must demonstrate **excellence** in clinical service, **proficiency** in the additional areas of their work assignment, and **scholarly activity**.

**Excellence in Clinical Service**
- documented clinical assignment and a major responsibility (i.e., leadership role) in a clinical program.
- clinician should have measurably and significantly improved the clinical program. Measures of improvement include obtaining funding support for the program through contracts, significantly increased revenues, or new patient referrals; evidence of significantly increased clinical-service-related collaborative partnerships with the community; evidence of improved health care outcomes, evidence of significantly increased cost effectiveness of the program (for example, improved clinic efficiencies); introduction of new technologies, methods or procedures that contribute to improved health care outcomes; or evidence of a significant contribution to improved public health.
- peer and supervisory reviews must support the rating of excellence
- reviews by recipients of the service must support rating of excellence

**Proficiency in Teaching**
- documented teaching assignment. Teaching includes activities that foster learning and critical thinking skills. Examples of direct teaching include lectures, workshops, small group facilitation, precepting, demonstration of procedural skills, and facilitation of on-line courses
- evidence of proficiency may include structured mentoring, advising activities, developing new instructional or curricular materials, evidence of learning, and participating in interdisciplinary teaching efforts.
- Satisfactory supervisory, peer, and trainee reviews

**Proficiency in Research**
- Regular dissemination of research findings (on average, at least annual publication for those with a 20% work assignment), the majority of which should be through traditional peer-reviewed publications
- For those with a work assignment in research of less than 20%, at least one peer-reviewed publication (or other evidence of dissemination of knowledge) during the period of review
- Reviews by collaborators, peers, and external reviewers indicating satisfactory performance

**Scholarly Activity** – See page 14
Service - Professor (Term): Candidate must demonstrate **excellence** in clinical service, **proficiency** in the additional areas of their work assignment, and **scholarly activity**.

**Excellence in Clinical Service**
- documented clinical assignment and a major responsibility (i.e., leadership role) in a clinical program.
- clinician should have measurably and significantly improved the clinical program. Measures of improvement include obtaining funding support for the program through contracts, significantly increased revenues, or new patient referrals; evidence of significantly increased clinical-service-related collaborative partnerships with the community; evidence of improved health care outcomes, evidence of significantly increased cost effectiveness of the program (for example, improved clinic efficiencies); introduction of new technologies, methods or procedures that contribute to improved health care outcomes; or evidence of a significant contribution to improved public health.
- peer and supervisory reviews must support the rating of excellence
- reviews by recipients of the service must support rating of excellence
- **for promotion to professor**: extra-university leadership in clinical service must be demonstrated. This can be demonstrated through participation in extramural clinical initiatives (examples: election to national committees, invitations as a visiting professor for clinical activity, participation in subspecialty board review or test development committees, invitation to be an accreditation [ACGME or LCME] site visitor)

**Proficiency in Teaching**
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- Reviews by collaborators, peers, and external reviewers indicating satisfactory performance

**Scholarly Activity** – See page 14
Service - Associate Professor (Tenure Track): Candidate must demonstrate excellence in clinical service, proficiency in the additional areas of their work assignment, and scholarship in one area.

Excellence in Clinical Service
- documented clinical assignment and a major responsibility (i.e., leadership role) in a clinical program.
- clinician should have measurably and significantly improved the clinical program. Measures of improvement include obtaining funding support for the program through contracts, significantly increased revenues, or new patient referrals; evidence of significantly increased clinical-service-related collaborative partnerships with the community; evidence of improved health care outcomes, evidence of significantly increased cost effectiveness of the program (for example, improved clinic efficiencies); introduction of new technologies, methods or procedures that contribute to improved health care outcomes; or evidence of a significant contribution to improved public health.
- peer and supervisory reviews must support the rating of excellence
- reviews by recipients of the service must support rating of excellence

Scholarship in Clinical Service
- innovations in clinical service (development of new protocols, new clinical programs or the expansion of existing programs) are expected annually and the acceptance of them and the dissemination of them
- the majority of peer acceptance must be through traditional peer-review publications, not limited to the area of clinical service
- extramurally funded clinical initiatives or research efforts
- present clinical innovations/findings, on average annually, in a national forum
- for tenure review: emerging regional/national recognition in a focused area of clinical expertise that is evidenced in extramural letters

Proficiency in Research
- Regular dissemination of research findings (on average, at least annual publication for those with a 20% work assignment), the majority of which should be through traditional peer-reviewed publications
- For those with a work assignment in research of less than 20%, at least one peer-reviewed publication (or other evidence of dissemination of knowledge) during the period of review
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Proficiency in Teaching
- documented teaching assignment. Teaching includes activities that foster learning and critical thinking skills. Examples of direct teaching include lectures, workshops, small group facilitation, precepting, demonstration of procedural skills, and facilitation of on-line courses
- evidence of proficiency may include structured mentoring, advising activities, developing new instructional or curricular materials, evidence of learning, and participating in interdisciplinary teaching efforts.
- Satisfactory supervisory, peer, and trainee reviews
Service - Tenured Professor: Candidate must demonstrate excellence in clinical service, proficiency in the additional areas of their work assignment, and scholarship in one area.

Excellence in Clinical Service
- documented clinical assignment and a major responsibility (i.e., leadership role) in a clinical program.
- clinician should have measurably and significantly improved the clinical program. Measures of improvement include obtaining funding support for the program through contracts, significantly increased revenues, or new patient referrals; evidence of significantly increased clinical-service-related collaborative partnerships with the community; evidence of improved health care outcomes, evidence of significantly increased cost effectiveness of the program (for example, improved clinic efficiencies); introduction of new technologies, methods or procedures that contribute to improved health care outcomes; or evidence of a significant contribution to improved public health.
- peer and supervisory reviews must support the rating of excellence
- for promotion to professor: extra-university leadership in clinical service must be demonstrated. This can be demonstrated through participation in extramural clinical initiatives (examples: election to national committees, invitations as a visiting professor for clinical activity, participation in subspecialty board review or test development committees, invitation to be an accreditation [ACGME or LCME] site visitor)

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- extramurally funded clinical initiatives or research efforts
- present clinical innovations/findings, on average annually, in a national forum
- for promotion to professor: must have national/international recognition in a focused area of clinical expertise demonstrated by such evidence as leadership roles in national forums, invitations to speak nationally or internationally. With respect to clinical trials, there should be evidence of a leadership role. Extramural letters should support a national/international reputation

Proficiency in Research
- Regular dissemination of research findings (on average, at least annual publication for those with a 20% work assignment), the majority of which should be through traditional peer-reviewed publications
- For those with a work assignment in research of less than 20%, at least one peer-reviewed publication (or other evidence of dissemination of knowledge) during the period of review
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- Satisfactory supervisory, peer, and trainee reviews
Teaching - Associate Professor (Term): Candidate must demonstrate excellence in teaching, proficiency in the additional areas of their work assignment, and scholarly activity.

Excellence in Teaching

- documented substantial teaching assignment with a major responsibility for (i.e., leadership role) a teaching program. Description of the faculty member’s role for a teaching program must include concise descriptions of the frequency and duration of the responsibility, outcomes, and evaluations of the outcomes.
- peer and supervisory reviews must support the rating of excellence
- reviews by the recipients (students or residents) must be obtained and should support the rating of excellence. The evidence should include the number of evaluations collected and should summarize results, including recipient comments when available
- examples of evidence of excellence include: teaching awards, engaging in structured mentoring or advising activities, developing new instructional or curricular materials, evidence of learning and critical thinking skills, and participation in interdisciplinary teaching efforts. Descriptions of the quantity and quality of these educator activities should demonstrate excellence

Proficiency in Research

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Proficiency in Service

- documented clinical assignment
- satisfactory peer and supervisory reviews of the clinical service
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Scholarly Activity – See page 14
Teaching - Professor (Term): Candidate must demonstrate excellence in teaching, proficiency in the additional areas of their work assignment, and scholarly activity.

Excellence in Teaching
- documented substantial teaching assignment with a major responsibility for (i.e., leadership role) a teaching program. Description of the faculty member’s role for a teaching program must include concise descriptions of the frequency and duration of the responsibility, outcomes, and evaluations of the outcomes.
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- for promotion to professor: extra-university leadership in teaching, curriculum development, advising/mentoring, educational leadership/administration, or learner assessment is required. This can be demonstrated by participation in extramural educational initiatives (examples: election or appointment to regional or national committees involved with teaching, curriculum development, advising/mentoring, educational leadership/administration, or learner assessment; invitations as a visiting professor for teaching activity; convening/chairing a national or regional conference focused on education; invitations to evaluate an educational activity at another institution; participation in subspecialty board review or test development committee; invitation to be an accreditation (AGME or LCME) site visitor.

Proficiency in Research
- Regular dissemination of research findings (on average, at least annual publication for those with a 20% work assignment), the majority of which should be through traditional peer-reviewed publications
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Scholarly Activity – See page 14
Teaching - Associate Professor (Tenure Track): Candidate must demonstrate excellence in teaching, proficiency in the additional areas of their work assignment, and scholarship in one area.

Excellence in Teaching
- documented substantial teaching assignment with a major responsibility for (i.e., leadership role) a teaching program. Description of the faculty member’s role for a teaching program must include concise descriptions of the frequency and duration of the responsibility, outcomes, and evaluations of the outcomes.
- peer and supervisory reviews must support the rating of excellence
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- examples of evidence of excellence include: teaching awards, engaging in structured mentoring or advising activities, developing new instructional or curricular materials, evidence of learning and critical thinking skills, and participation in interdisciplinary teaching efforts. Descriptions of the quantity and quality of these educator activities should demonstrate excellence

Scholarship in Teaching
- innovations in teaching (development of new methodologies or application of existing methodologies in a new way), curriculum, student advising/mentoring, leadership/administration, or student assessment, are expected annually, as is the dissemination and peer acceptance of them
- the majority of peer acceptance must be through traditional peer-review publications, not limited to the area of teaching
- secure funds for teaching/educator activities through an intramural or extramural peer-reviewed process
- present instructional innovations/findings, on average annually, at national forums
- for tenure review: an emerging regional/national recognition in a focused area of teaching or educator activity that is supported by extramural letters

Proficiency in Research
- Regular dissemination of research findings (on average, at least annual publication for those with a 20% work assignment), the majority of which should be through traditional peer-reviewed publications
- For those with a work assignment in research of less than 20%, at least one peer-reviewed publication (or other evidence of dissemination of knowledge) during the period of review
- Reviews by collaborators, peers, and external reviewers indicating satisfactory performance

Proficiency in Service
- documented clinical assignment
- satisfactory peer and supervisory reviews of the clinical service
- reviews by referring physicians and patient satisfaction surveys may also be obtained to document proficiency
- community service must involve medical and/or basic science expertise. Evidence of significantly increased clinical-service-related collaborative partnerships with the community may be presented as a supplement
Teaching - Tenured Professor: Candidate must demonstrate excellence in teaching, proficiency in the additional areas of their work assignment, and scholarship in one area.

Excellence in Teaching
- documented substantial teaching assignment with a major responsibility for (i.e., leadership role) a teaching program. Description of the faculty member’s role for a teaching program must include concise descriptions of the frequency and duration of the responsibility, outcomes, and evaluations of the outcomes.
- peer and supervisory reviews must support the rating of excellence
- reviews by the recipients (students or residents) must be obtained and should support the rating of excellence. The evidence should include the number of evaluations collected and should summarize results, including recipient comments when available
- examples of evidence of excellence include: teaching awards, engaging in structured mentoring or advising activities, developing new instructional or curricular materials, evidence of learning and critical thinking skills, and participation in interdisciplinary teaching efforts. Descriptions of the quantity and quality of these educator activities should demonstrate excellence
- for promotion to professor: extra-university leadership in teaching, curriculum development, advising/mentoring, educational leadership/administration, or learner assessment is required. This can be demonstrated by participation in extramural educational initiatives (examples: election or appointment to regional or national committees involved with teaching, curriculum development, advising/mentoring, educational leadership/administration, or learner assessment; invitations as a visiting professor for teaching activity; convening/chairing a national or regional conference focused on education; invitations to evaluate an educational activity at another institution; participation in subspecialty board review or test development committee; invitation to be an accreditation (AGME or LCME) site visitor.

Scholarship in Teaching
- innovations in teaching (development of new methodologies or application of existing methodologies in a new way), curriculum, student advising/mentoring, leadership/administration, or student assessment, are expected annually, as is the dissemination and peer acceptance of them
- the majority of peer acceptance must be through traditional peer-review publications, not limited to the area of teaching
- secure funds for teaching/educator activities through an intramural or extramural peer-reviewed process present instructional innovations/findings, on average annually, at national forums
- for promotion to professor: must have national/international recognition in a focused area of teaching or educator activity that is demonstrated by such evidence as leadership roles in national forums, consultations at other universities, serving as a reviewer or editor, or invitations to speak. Extramural letters should support a national/international recognition

Proficiency in Research
- Regular dissemination of research findings (on average, at least annual publication for those with a 20% work assignment), the majority of which should be through traditional peer-reviewed publications
- For those with a work assignment in research of less than 20%, at least one peer-reviewed publication (or other evidence of dissemination of knowledge) during the period of review
- Reviews by collaborators, peers, and external reviewers indicating satisfactory performance

Proficiency in Service
- documented clinical assignment
- satisfactory peer and supervisory reviews of the clinical service
- reviews by referring physicians and patient satisfaction surveys may also be obtained to document proficiency
- community service must involve medical and/or basic science expertise. Evidence of significantly increased clinical-service-related collaborative partnerships with the community may be presented as a supplement
Criteria: **Proficiency** in all areas assigned on the work plan for the period of review and **Scholarly Activity**.

**Proficiency in Research**
- regular dissemination of research findings (on average, at least annual with a 20% work assignment) the majority of which should be through traditional peer-reviewed publications
- reviews by collaborators, peers and external reviewers indicating satisfactory performance
- for those with a work assignment in research of less than 20% at least one peer-reviewed publication (or other evidence of dissemination of knowledge) during the period of review. Disseminated scholarship can be demonstrated through journal articles, papers on pedagogic issues, review articles, case reports, clinical outcomes studies, educational outcomes studies, electronic dissemination (e.g. computer programs, CD-ROM, videos, web-based), textbooks, book chapters, technology transfer, development of new protocols that are widely accepted, development of teaching tools, curricula or curricular models, study guides, computer-aided tools, new evaluation methodologies, well subscribed faculty development programs, workbooks adopted by other institutions and development of patents.

**Proficiency in Teaching**
- documented teaching assignment. Teaching includes activities that foster learning and critical thinking skills. Examples of direct teaching include lectures, workshops, small group facilitation, precepting, demonstration of procedural skills, and facilitation of on-line courses
- evidence of proficiency may include structured mentoring, advising activities, developing new instructional or curricular materials, evidence of learning, and participating in interdisciplinary teaching efforts.
- Satisfactory supervisory, peer, and trainee reviews

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- documented clinical assignment
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**Scholarly Activity** – See page 14
**SCHOLARLY ACTIVITY**

Scholarly activity must be demonstrated regularly (i.e., on average annually) for a satisfactory review for tenured faculty and for promotion of non-tenurable faculty to the rank of Associate Professor or Professor.

Scholarly activity is defined as those activities in which faculty take a scholarly approach to education, clinical, and/or research activities. These occur when faculty systematically design, implement, access, or redesign educational, clinical, or research activities.

Examples of scholarly activity include but are not limited to the following:

- journal articles, papers on pedagogic issues, review articles, case reports, clinical outcomes studies, electronic dissemination, textbooks, book chapters, workbooks adopted by other institutions
- technology transfer, development of new protocols that are widely accepted, development of teaching tools, curricular or curricular models, study guides, computer-aided tools, new evaluation methodologies, well subscribed faculty development programs, development of patents
- invited lectureships, giving grand rounds, extra-university leadership roles, presentations of scholarship at national forums,
- substantial contribution to a local or national clinical trial
- service as a board reviewer or writing board review questions
- active service on a regional or national committee or a board related to clinical care, education, or research
- intramural or extramural funding for a clinical or educational project
- leadership role in a local, regional, or national conference or in a multidisciplinary intramural conference on education or clinical care
- evidence-based development or revision of organizational policy
- poster or oral presentation at a local, regional, or national meeting
- incorporation of new teaching technology or an evidence-based educational module into a curriculum
- leadership or substantial role in a quality improvement project that documents effectiveness or leads to improved processes, clinical care, or outcomes
- leadership role in the development or revision of evidence-based clinical practice procedures, guidelines, or treatment algorithms (e.g., order sets)
- evidence-based consultation to public officials at community, regional, state, or national venues