Demystifying Promotions: Longer Service Workshop

Carol Bates, MD
Thursday, November 8, 2012
9 – 11 AM
Register for our programs at the BWH Health Events Calendar:

www.brighamandwomens.org/calendar

Sign up to receive our monthly e-bulletin CFDD Highlights!
Delivering Effective Feedback: An Essential Skill – 11/14
  - Co-sponsored by the Center for Professionalism & Peer Support

Effective Negotiations – 11/27

Demystifying Promotions:
  - Preparing You, and Your CV, for Promotion at Harvard Medical School - @BWFH – 11/28

BWH Seminar Series for Medical Educators – Mondays through 11/19
HMS OFA Website for Faculty Promotions
General Info: http://facultypromotions.hms.harvard.edu
CV Resources: http://cv.hms.harvard.edu/

BWH Departmental mentors, chiefs, members of the P&R Committees

Center for Faculty Development & Diversity
http://www.brighamandwomens.org/cfdd

CFDD Consultation Services
- CV Consultations
  For faculty within 6 months of submitting promotions materials
- Promotions and Faculty Development Consultations
CFDD Resources for Faculty & Fellows

A myriad of resources available on our website:

www.brighamandwomens.org/cfdd

- Fellowships and Awards
- Academic Advancement criteria, videos, templates
- Work/Life balance assistance
- CV and Career Consultations
- NEW Mentoring Toolkit
Center for Faculty Development & Diversity
BWHCFDD@partners.org   617-525-7646

Office for Research Careers
BWHORC@partners.org   617-525-9323

Office of Multicultural Faculty Careers
BWHOMC@partners.org   617-525-9324

Office for Women’s Careers
OWC@partners.org   617-723-8595
Academic Advancement at HMS: Instructor to Assistant Professor Longer Service Workshop

Carol Bates, MD
Assistant Dean for Faculty Affairs
Harvard Medical School
November 8, 2012
Why Seek Promotion?

- Increase opportunities locally and outside Harvard
- Obtain official recognition for accomplishment from the University
- Join the voting members of the faculty
- Serve as a role model for students
- Increase the term of your appointment
- Possibly increase compensation
Longer Service Criteria

- Significant and sustained contributions to the teaching mission of HMS, HSDM, and affiliates
- Clinicians and teachers for $\geq 10$ years
- No requirement for scholarship
- Contributions in investigation, education of patients and service to community, administration and institutional service are considered
- Three letters of evaluation (can all be internal)
- Approval of Department Executive Committee
Longer Service Promotion History

1999-2000: 46 promotions
2001-2002: 50 promotions
2003-2004: 24 promotions
2005-2006: 29 promotions
2007-2008: 37 promotions
2009-2010: 47 promotions
2011-2012: 47 promotions

Note: The number of promotions varies each year.
Teaching requirements

- Critical for all promotions
- “Continuing growth” as teachers
- Continuous teaching
- Teaching outside Harvard and affiliates not considered
- HMS expectation of minimum 50 hrs/year can include: Students, Residents, Fellows, Peers
- To be clarified in coming year:
  - Guidelines for listing “formally supervised trainees”
  - CV will include section for role in Scholars of Medicine
What arrives at the Medical School?

- Letter from the Department Chair
  - Educational background and training
  - Contributions as a teacher, clinician, administrative leader
- Approval of the Department Executive Committee
- CV in the Harvard format
- Letters of evaluation/support
  - Obtained by the Division Chief or Department Chair
Review in the Office for Faculty Affairs

- Review of materials to be sure the CV format is correct and the essential information is present and clear
  - Department is contacted if changes needed

- Confirm the number of letters

- Common issues on review
  - Inadequate documentation of teaching
  - Inadequate narrative
  - Letters imply initial intent to promote through P&R mentioning area of excellence
  - Scholarship that might meet P&R promotion
Review Process

- Committee meets 6 times a year
- Each case is reviewed by a member who is not in the candidate’s department or hospital
- Committee discussion focuses on teaching and other contributions
- Vote by secret ballot is advisory to the Dean
- Final review by Provost typically 2 months after meeting
Longer Service Promotion Process

Appointing Institution
- Hospital Department Process
- Department Executive Committee

University
- Review by the Provost

HMS
- Submission to Faculty Affairs
- Review by LS Committee
- Review by the Dean’s Office
- Notification of Department
- Notification of Candidate

Governing Boards
Frequently Asked Questions

- How will a Longer Service promotion affect my title?
- What if I have been away from Harvard for some time?
- What if I contributed at another academic institution prior to coming to HMS – does that count?
- Can I go forward to Associate Professor?
- What kind of teaching counts for Longer Service promotion?
- What kind of clinical service counts for Longer Service promotion?
Promotion to Associate Professor

- No analogous Longer Service pathway
- Occurs in Areas of Excellence
  - Clinical Excellence and Innovation
  - Teaching and Educational Leadership
  - Investigation
Longer Service Criteria

The Longer Service Criteria are primarily intended to reward faculty for significant and sustained contributions to the teaching mission of HMS, HSDM, and their affiliated institutions. Eligible faculty are full-time or part-time clinicians who have dedicated at least 10 years as faculty members to education and have demonstrated continuing growth in their roles as teachers. Teaching is broadly defined to include didactic teaching of students, trainees and peers, clinical teaching and mentorship, and administrative teaching leadership roles. Teaching of Harvard medical, dental, and graduate students will be particularly noted. Teaching outside Harvard and its affiliates will not be considered as supporting evidence for the promotion.

There is no requirement for written scholarship. As with all promotions, consideration will be given to the sum total of the individual's achievements. The evaluation will consider significant supporting activities, including contributions in the areas of investigation, clinical expertise, education of patients and service to the community, and administration and institutional service.

Promotion by Longer Service Criteria is only to the rank of Assistant Professor. Promotion by these criteria does not preclude promotion to Associate Professor, but evaluation for subsequent promotions would require scholarship and would be based on the criteria for Associate Professor described elsewhere in this document.

Longer Service Metrics

<table>
<thead>
<tr>
<th>Teaching may take the form of:</th>
<th>Examples of Metrics</th>
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<tbody>
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</table>
Your CV and Longer Service Promotion

To showcase your accomplishments in crisp, organized, easy to read format
Welcome to the Harvard Medical School and Harvard School of Dental Medicine Curriculum Vitae website. This website includes the following materials to assist you in preparing your CV:

**CV Preparation Tools**

- Detailed instructions, including guidelines for preparing bibliography citations
- Microsoft Word based CV templates
- Mock CV example (coming soon)
- Answers to frequently asked questions about the CV (coming soon)

**Other CV Resources**

- Presentations about the CV
  - Schedule of dates and times
  - Copy of slides from CV presentations
- List of individuals who have participated in additional training about the CV and may serve as a resource for you (coming soon)
- Link to the Faculty Affairs home page and the New Promotion Criteria website
### Harvard Medical School/ Harvard School of Dental Medicine
Format for the Curriculum Vitae

#### Date Prepared:

<table>
<thead>
<tr>
<th>Name:</th>
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<table>
<thead>
<tr>
<th>Office Address:</th>
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<th>Home Address:</th>
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<th>Work FAX:</th>
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<th>Place of Birth:</th>
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#### Education

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#### Postdoctoral Training

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#### Faculty Academic Appointments

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#### Appointments at Hospitals/Affiliated Institutions

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#### Other Professional Positions

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#### Major Administrative Leadership Positions

<table>
<thead>
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<th>Local</th>
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<th>Regional</th>
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<th>National and International</th>
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#### Committee Service

<table>
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<th>Local</th>
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<th>Regional</th>
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</table>

<table>
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<th>National and International</th>
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#### Professional Societies

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#### Grant Review Activities

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#### Editorial Activities

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#### Other Editorial Roles

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#### Honors and Prizes

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#### Report of Funded and Unfunded Projects

##### Funding Information

<table>
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<th>Local</th>
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<table>
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<th>Regional</th>
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<table>
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<tr>
<th>National and International</th>
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##### Report

<table>
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<table>
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<tr>
<th>Regional</th>
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<thead>
<tr>
<th>National and International</th>
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##### Current

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##### Additional Information

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HMS/HSDM CV - 2011
**Education**

- List all degree programs beginning with college; may also include courses of study at institutions of higher learning of at least one year in duration. Only include actual degrees, not the US equivalents.
- Do not include educational experiences of less than one year duration for which you were not granted a degree.
- For each degree program indicate:

<table>
<thead>
<tr>
<th>Year</th>
<th>Degree (Honors)</th>
<th>Fields of Study (Thesis advisor for doctoral research degrees)</th>
<th>Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>1998</td>
<td>MD, PhD summa cum laude</td>
<td>Medicine and Microbiology (name of PhD advisor here)</td>
<td>Johns Hopkins University</td>
</tr>
</tbody>
</table>

**Postdoctoral Training**

<table>
<thead>
<tr>
<th>Year(s)</th>
<th>Title</th>
<th>Specialty/Discipline (Lab PI for postdoctoral research)</th>
<th>Institution</th>
</tr>
</thead>
<tbody>
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</tbody>
</table>
Features of the Preformatted Template

Note: The appearance of the template on your screen varies depending on your computer settings. The view that works best during preparation is:

- **Hyperlinks to detailed instructions for each section**
- **Column headings with brief instructions that will disappear when document is printed**
- **Gridlines to show you where table rows and columns are. Gridlines will disappear when printed**

### Education
- **Year**
- **Degree (Honors)**
- **Fields of Study (Thesis advisor for doctoral research degrees)**
- **Institution**

### Postdoctoral Training
- **Year(s)**
- **Title**
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### Faculty Academic Appointments
- **Year(s)**
- **Academic Title**
- **Department**
- **Academic Institution**
Harvard Medical School/Harvard School of Dental Medicine
Format for the Curriculum Vitae

### Date Prepared:

### Name:

### Office Address:

### Home Address:

### Work Phone:

### Work Email:

### Work FAX:

### Place of Birth:

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### Education

<table>
<thead>
<tr>
<th>Year</th>
<th>Degree</th>
<th>Fields of Study</th>
<th>Institution</th>
</tr>
</thead>
<tbody>
<tr>
<td>1980-1984</td>
<td>BS</td>
<td>Biochemistry</td>
<td>DePaul University</td>
</tr>
<tr>
<td>1985-1989</td>
<td>PhD</td>
<td>Cell Biology</td>
<td>Duke University</td>
</tr>
</tbody>
</table>

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<table>
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<td></td>
<td>(Lab PI for postdoctoral research)</td>
<td></td>
</tr>
</tbody>
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Harvard Medical School/Harvard School of Dental Medicine
Format for the Curriculum Vitae

Date Prepared:
Name:
Office Address:
Home Address:
Work Phone:
Work Email:
Work FAX:
Place of Birth:

Education
1980-1984  BS  Biochemistry  DePaul University
1985-1989  PhD  Cell Biology  Duke University

Postdoctoral Training
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  - Schedule of dates and times
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- Link to the Faculty Affairs home page and the New Promotion Criteria website
General Instructions for Preparation of the Curriculum Vitae
Harvard Medical School/Harvard School of Dental Medicine

The CV, along with letters from internal and external referees and examples of scholarly work, provides the major evidence used during the evaluation of candidates for promotion. Therefore, accurate and complete reporting of contributions and achievements in the CV is essential. Below is some general guidance for preparation of the CV. Additional guidance is provided in each section of the CV.

- **Chronology of events**: All events in the CV should be chronologic, beginning from the earliest and ending with the most recent. When dates cover a range, (e.g., 2005-2007), order by the first year in the range. For ongoing activities, indicate with a dash (2004-) or by specifically noting ‘to present’ (2004 – present). If multiple, non-consecutive years, group as a single item (e.g., 1999-2001, 2004, 2007). For faculty based at affiliated clinical institutions, all dates for postdoctoral training positions, faculty academic appointments and appointments at hospitals/affiliated institutions should include the month and year, e.g., 07/99-06/05.

- **Definition of local, regional, national and international**: A number of activities and roles in the CV are categorized as local, regional, national or international. These designations are important in the evaluation for promotion as it is expected that the reach of one’s influence and activities will broaden with rank. Thus, while many of the activities reported at the time of promotion to assistant professor will be local, it is expected that those under consideration for promotion to professor will participate in a broad range of national and, very often, international activities.

The designations of local, regional, national or international below are based on both the proximity of the activities to the institution at which the candidate was appointed at that time as well as the source of the invitation to speak/teach.

- **Local activities and roles**: During the time of appointment at Harvard, includes activities and roles at or arranged by Harvard and its affiliated institutions and organizations (e.g., Partners Harvard Medical International, Pri-MED, Partners in Health).
General CV Formatting

- Always report activities from oldest to most recent
- Appointments should match HMS records
- Each activity/role should be listed only once
- If a category doesn’t apply, leave it off
  - Keep a shadow CV that includes all categories
- Include page numbers
- Avoid abbreviations known only to your subspecialty
  - Your CV will be read by people outside of your field
- All faculty are required to teach; include teaching section
- Your narrative should highlight your work
Leadership and Committees

- **Major Administrative Leadership**
  - Includes educational, clinical, research and general administrative leadership positions
  - Group by Local, National, International
  - Grant review, committee work, lay society work appear elsewhere

- **Committee work**
  - Group by Local, National, International
  - Grant review, committee work, lay society work appear elsewhere
Education

1998-2001 MD (Medicine) Albany Medical College, Albany NY

Postdoctoral Training

09/01-06/03 Clinical Fellow in Medicine, Interventional Cardiology
Massachusetts General Hospital

Faculty Academic Appointments

06/03-09/07 Instructor in Medicine
Massachusetts General Hospital, HMS

09/07- Assistant Professor of Medicine
Massachusetts General Hospital, HMS

Appointments at Hospitals/Affiliated Institutions

2003- Assistant Physician
Massachusetts General Hospital, Department of Medicine

Major Administrative Leadership Positions

Local
2007- Director, Interventional Cardiology Fellowship
Massachusetts General Hospital, Department of Medicine

National
2006 Co-Chair, Cancer Genome Atlas Network
NCI/NHGRI
Professional Societies

2001- American Heart Association Member

2003- American College of Cardiology

2003-2005 Member
2005- Fellow
2001-2002 Member, Meritorious Service Review Committee
2003- Chair, Women in Cardiology Committee

Grant Review Activities

National
2002-2007 NHLBI R21 Study Section NIH

2000-2002 Ad hoc Member
2003-2007 Permanent Member
Grant Funding

- List as
  - Past funding
  - Current funding
  - Unfunded projects
- Include direct costs if PI, co-PI, site PI
Report of Funded and Unfunded Projects

Funding Information

Current

2006-2010  The role of isoflavones in the management of hot flashes
            NCCAM/R21 1234567A
            PI ($275,000)
            The major goal of the study is to use skin conductance measurements to quantify the impact of different isoflavones on hot flash frequency and severity.

2007-2012  Evaluating decision-making in childhood vaccinations
            AHRQ/R01 1234567A
            Co-Investigator (PI - Jones)
            The major goals of this study are to evaluate factors that lead to parental refusal to vaccinate and to design an intervention for health care professionals that will increase the acceptability of vaccinations. My role is to design the tool that will measure parental preferences and attitudes toward vaccination and to interpret the data.

Current Unfunded Projects

2009-2012  Pilot study of the association of the OSCE with performance on Medical Board examinations (Mentor)
            I am supervising an Academy fellow in evaluating the association between OSCE performance and Part I of the Medical Board examinations
Current Unfunded Projects

Report of Local Teaching and Training

Teaching of Students in Courses

Formal Teaching of Residents, Clinical Fellows and Research Fellows (post-docs)

Clinical Supervisory and Training Responsibilities

Laboratory and Other Research Supervisory and Training Responsibilities

Formally Supervised Trainees

Formal Teaching of Peers (e.g., CME and other continuing education courses)

Local Invited Presentations

Report of Regional, National and International Invited Teaching and Presentations

Invited Presentations and Courses

Regional

National

International

Report of Clinical Activities and Innovations

Current Literature and Certification

Practice Activities

Clinical Innovations

Report of Technological and Other Scientific Innovations

Report of Education of Patients and Service to the Community

Activities

Educational Material for Patients and the Lay Community

Books, monographs, articles and presentations in other media

Educational material or curricula developed for non-professional students

Patient educational material

Recognition
Report of Local Teaching and Training

Teaching of Students in Courses

- The classification of teaching in courses as local (vs. regional/national/international) is determined by the institution initiating the invitation. Thus, all courses for which the invitation originates with an individual or group affiliated with Harvard (e.g., Partners Harvard Medical International, Pri-MED, Partners in Health) should be considered local and reported in this section.

- List each course in which you have taught medical, dental, graduate or undergraduate students, grouped according to the following categories:
  - Teaching prior to start of your current Harvard appointment; organize according to the institution at which held your primary appointment, presenting chronologically for each institution
  - Teaching during your current Harvard appointment; organize in the following categories and present chronologically within each:
    - HMS/HSDM/DMS courses
    - Other Harvard University courses (specify school, e.g., HSPH, Kennedy School, FAS undergraduate students or GSAS graduate students not based at HMS)

- Do not include:
  - Leadership roles in courses (e.g., course director), which should be reported under Major Administrative Leadership Positions
  - Dental students in clinical rotations, which is reported under clinical supervisory activities
  - Conferences are repeated over multiple years
Report of Local Teaching and Training

Teaching of Students in Courses

2000- The Human Body HMS
1st year Medical Students 3hr tutorial sessions per wk/ 8 wks

Formal Teaching of Residents, Clinical Fellows and Research Fellows (post-docs)

2006-2007 Management of cholelithiasis BIDMC
1st yr Surgery residents One hour lecture per yr

Clinical Supervisory and Training Responsibilities

2000-2007 Ambulatory Internal Medicine Clinic
Preceptor, Children’s Hospital Boston One half session per week
Formally supervised trainees

- List only those trainees on whose careers you have had a substantial impact
- For training directors, only selected trainees will meet this criterion
- Research supervision will most often have resulted in writing a grant application or a joint publication
- Do not include individuals for whom you have only provided general career advice
Local Invited Presentations

Those presentations below sponsored by outside entities are so noted and the sponsor is identified:

2003  Cardiovascular Disease update/Grand Rounds
      Department of Medicine, BWH

2003  Treatments for Asthma in Children: Update/Lunchtime Speaker Series
      Harvard Vanguard Medical Associates (Novartis)
Report of Clinical Activities and Innovations

Current Licensure and Certification

1998 Massachusetts Medical License

Practice Activities

1998-2004 Ambulatory Care Pediatric Cardiology, 2 sessions per week (16 hours/week) CHB

Clinical Innovations

Electronic medical record (EMR) QA improvement system at Martha Elliot Health Center (2004): This EMR modification has improved practice in 3 clinical areas (documenting patient allergies; confirming follow up on abnormal pap smears; scheduling childhood immunizations). These outcomes have been reported at the American Family Practice Society meeting and I have been invited to discuss this system with Harvard Pilgrim Health Care.
Report of Scholarship

- Peer-reviewed publications in print or other media
  - Research investigations
  - Other peer-reviewed publications
    - i.e. reviews, meta-analyses, case reports
  - Research publications without named authorship
- Non peer-reviewed publications
  - Proceedings of meetings
  - Reviews, chapters, monographs, editorials
  - Books/Textbooks
  - Case reports
  - Letters to the Editor
Citation Guidelines

- Use the ICMJE (International Committee of Medical Journal Editors) requirements.
- These are published by the U.S. National Library of Medicine, NIH:
  http://www.nlm.nih.gov/bsd/uniform_requirements.html
- One notable exception: Do not use *et. al.*
  List All Authors on each Cited Scholarship
Narrative Report

- Important chance to share accomplishments in your own words
- Demonstrate connections across your activities
- Written in first person targeting ~500 words
- Suggested structure:
  - Summary of major activities and achievements with estimate of % effort dedicated to teaching, research, clinical service, administration
  - Contributions to clinical care
  - Contributions to teaching and education. May include mentorship activities not captured elsewhere in the CV
  - Contributions in administration, service to patients and the community, and investigation if applicable
  - A final summary paragraph
Common pitfalls

- Invited teaching and presentations: local, regional, national, international designation
  - Helps to clarify the extent of your reputation
  - Relates to scope of conference not just location
- Insufficient documentation of teaching
- Unused categories
- Papers “submitted”
- Abstracts beyond 3 years
Resources

- [http://facultypromotions.hms.harvard.edu/](http://facultypromotions.hms.harvard.edu/)
  - Create “customized” criteria for your rank and activities
- [http://cv.hms.harvard.edu/](http://cv.hms.harvard.edu/)
  - Detailed instruction guide and templates
  - Administrative resources for Junior faculty promotions

- Dedicated e-mail and phone line for questions
  - E-mail: [OFA_Promotions@hms.harvard.edu](mailto:OFA_Promotions@hms.harvard.edu)
  - Phone: 617-432-7112
Office for Faculty Affairs

- Maureen Connelly, MD, MPH, Dean for Faculty Affairs
- Carol Bates, MD, Assistant Dean for Faculty Affairs

Program Directors:
- Mahnaz El-Kouedi, PhD
- Zoe Fonseca-Kelly, PhD
- Bethany Westlund, PhD

Promotions Specialists
- Molly Deschenes
- Veronica Leo
Questions?

Thank you!
Thank You!
Areas of Excellence

Metrics

- Scholarship
- Invitations to speak
- Funding
- Service on committees
- Leadership in organizations
- Editorial roles
- Awards
- Teaching
Creating a Promotion Profile

Select ONE area of excellence representing the major area of contribution, achievement, and impact.

Areas of Excellence

Teaching and Educational Leadership
Clinical Expertise and Innovation
Investigation

Evaluation for Teaching and Education

ALL candidates will be evaluated for teaching and educational contributions.

MAY identify other significant supporting activities.

Significant Supporting Activities

Clinical Expertise
Investigation
Education of Patients and Service to the Community
Administration and Institutional Service
<table>
<thead>
<tr>
<th>Promotion Process Milestones (Click to view details)</th>
<th>Date</th>
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<tbody>
<tr>
<td>Dossier received at HMS</td>
<td></td>
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<tr>
<td>Dossier incomplete, additional information requested from candidate’s Department</td>
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<tr>
<td>Dossier under review in Office for Faculty Affairs</td>
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<tr>
<td>Additional clarification requested from Department</td>
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<tr>
<td>Contacted Department to follow up</td>
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<tr>
<td>Contacted Department to follow up</td>
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<td>Contacted Department to follow up</td>
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<tr>
<td>Contacted Department to follow up</td>
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<tr>
<td>Materials complete and approved for a future HMS promotions committee (P&amp;R) review</td>
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<tr>
<td>Anticipated P&amp;R committee meeting</td>
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<tr>
<td>P&amp;R committee review complete; recommendations of committee under consideration by HMS</td>
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<tr>
<td>Dossier forwarded to University for evaluation</td>
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<tr>
<td>Final outcome communicated to Department</td>
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</table>