

# Promotion Process & Criteria

Emily Green, PhD, MA

*Associate Vice Provost for Faculty Development*



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Office of  
Faculty Affairs

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**Promotion & the  
Promotion Process**

②

**Criteria for  
Promotion**

③

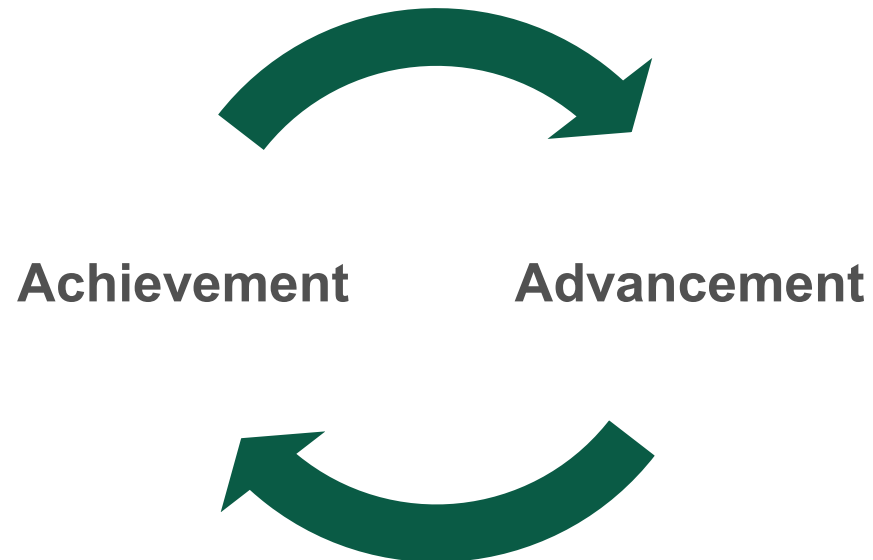
**Preparing for  
Promotion**

Academic advancement requires effort above and beyond doing the job for which you were hired.

Given this, **why should you pursue promotion?**

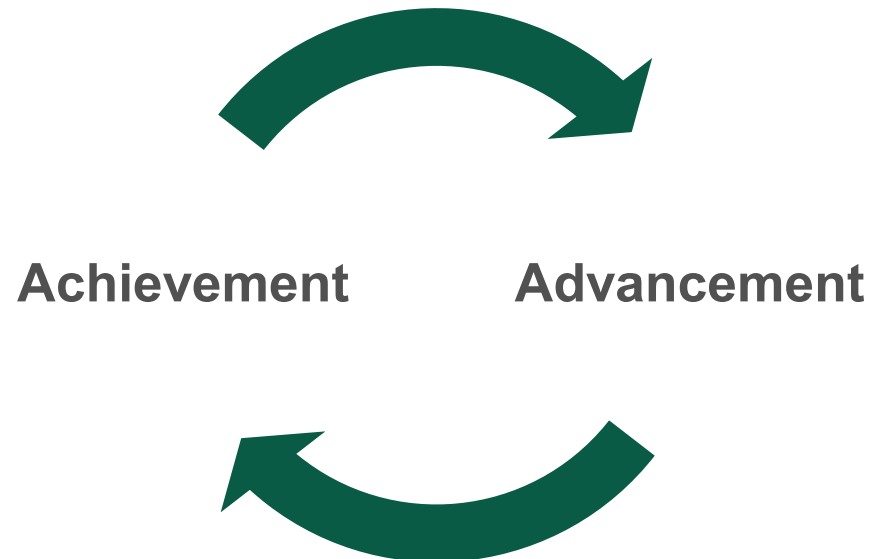
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Given this, **why should you pursue promotion?**



Validation of scholarship

Recognition within the institution

Recognition within your profession

Increased influence & impact

Career & leadership opportunities

Potential financial benefits\*

\*Salary benchmarking is often tied to academic rank

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graph LR; A[Appointment] --> B[Setting of career goals]; B --> C[Accessing resources & support]; C --> D[Academic advancement]; D --> E[Career development & satisfaction];
```

Appointment

Setting of  
career goals

Accessing  
resources &  
support

Academic  
advancement

Career  
development  
& satisfaction

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Appointment

Setting of  
career goals

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Career  
development  
& satisfaction



ABOUT OFA

FACULTY DEVELOPMENT

ACADEMIC AFFAIRS

COMMITTEES

GOVERNANCE & POLICIES

## Faculty Development

The Office of Faculty Affairs strives to support UMass Chan faculty and to facilitate their academic growth and advancement. We want every faculty member to have access to the support they need to meet their professional development goals across their career.

Find a UMass Chan program that is right for you! Click on a program inventory, or explore the opportunities and resources below.

[ROADMAP of Professional Development](#)

[Programs for Basic Science Faculty](#)

[Programs for Clinical Faculty](#)

[Programs Offered Virtually](#)

[Programs Offered In-Person](#)

[Tuition-Free Programs](#)

### Opportunities and resources for new and junior faculty



#### New Faculty Orientation

A virtual program offered 3x per year to help orient new faculty



#### Junior Faculty Development Program

A longitudinal professional development program for junior faculty



#### Investigator Career Advancement Program

A professional development program for incoming tenure-track junior faculty



#### Finding a Mentor

Information about finding a faculty mentor



<https://www.umassmed.edu/ofa/development/>

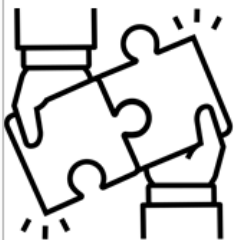
# NewsWire Newsletter

 UMass Chan  
MEDICAL SCHOOL | Office of  
Faculty Affairs



May 1, 2026 Edition

## RESOURCE HIGHLIGHTS



### Looking for help with a research project?

U-MATCH is the go-to place for students and trainees to discover active research projects to join, and for faculty members to recruit student and trainee collaborators. Faculty members simply fill out a form and their project will be posted on the U-MATCH list!

[Visit the Website](#)

## ANNOUNCEMENTS



### Chancellor's Medals- Nominations Invited

Nominations for the 2026 Chancellor's Medals for Distinguished Teaching, Scholarship, Service, and Clinical Excellence are due by June 3, 2026. These four annual faculty medals represent the highest achievements in teaching, research, service, and clinical care and are presented by the chancellor at the Convocation/Investiture Ceremony, which marks the beginning of each academic year. Faculty members in any of the three schools—medicine, nursing, and biomedical sciences—who hold the rank of associate or full professor are eligible for nomination.

\*Send all initial nominations and/or questions about the nomination process to Kimberly LaPerle: [kimberly.laperle@umassmed.edu](mailto:kimberly.laperle@umassmed.edu) or 508-856-8992.



### April Faculty Promotions

**Jonathan S. Abelson, MD, MS**  
Associate Professor, Department of Surgery UMass Chan Lahey

**Dustin Burns, PhD, PStat**  
Assistant Professor, Department of Population and Quantitative Health Sciences

**Heather Gray-Edwards, DVM, PhD**  
Associate Professor, Department of Genetic and Cellular Medicine

**Yesenia Greeff, MD**  
Associate Professor, Department of Medicine UMass Chan Baystate

**Kristin Laraja, MD**  
Associate Professor, Department of Pediatrics

## UPCOMING EVENTS



### BRIDGE Innovation & Business Development Speaker Series

**Date:** April 9 & May 7, 2026

**Time:** 2:30-4:00pm

**Location:** in-person (Albert Sherman Center, UMass Chan Medical School) & virtual options

Join us for a two-part industry speaker series hosted by BRIDGE. Each session brings together leaders from academia, biotech and pharma to explore how discoveries move from the lab to life-changing solutions.

Upcoming sessions include:  
Translating Research for Drug Development with Domi Stickers, PhD, Chief Scientific Officer, Arrakis Therapeutics

Cell & Gene Therapy – Navigating the Next Decade with Jennifer Adair, PhD, Professor & Vice Chair, Dept. of Genetic & Cellular Medicine

*All sessions are open to the UMass Chan community and invited guests.*

[Register](#)

### Financial Wellness for Faculty

**Date:** May 19, June 9 & 23, 2026



### Inclusive Teaching in Clinical Education

REGISTER

April 28 | 12:00-1:00pm  
Presenter: Mary Paterno, PhD, CNM, FACNM;  
Associate Professor of Obstetrics & Gynecology-  
Baystate

Using inclusive teaching strategies designed for a diverse body of learners is imperative to developing a robust and varied clinical workforce. This session will review concrete strategies for inclusive teaching that can be applied in the classroom and the clinical setting in a way that promotes a sense of welcome and belonging. When inclusive teaching is successful, all students receive the tools and resources they need to be successful.



### HEALL Core Workshop Series – Virtual Re-Run (Spring 2026)

REGISTER

April 29 | 4:30-5:45pm  
Presenter: Emily Green, PhD, MA

The Health Education Academy for Leadership and Learning (HEALL) is offering a limited virtual re-run of four Core Workshops originally presented in person during AY 25–26. Designed for faculty and professional staff seeking to strengthen their teaching skills, advance educational scholarship, and support educator career development, this series provides another opportunity to engage with foundational topics in health professions education. April 29: Initiating Educational Scholarship



### Financial Wellness for Faculty

REGISTER

Save Well (Session 1 of 3)  
May 19 | 12:00-1:00pm  
In this first of three sessions on financial wellness for faculty, you will learn to manage your significantly increased cash flow, and the risks that can jeopardize the integrity of your personal finances. We will focus on the first step of planning for a successful retirement: Helping you understand your retirement



the integrity of your personal finances. We will focus on the first step of planning for a successful retirement: Helping you understand your retirement goals and the factors that will impact those goals. *This session is open to all faculty and is especially appropriate for early career clinicians and researchers.*



Invest Well (Session 2 of 3)  
June 9 | 12:00-1:00pm  
In this second of three sessions on financial wellness for faculty, we will cover how you can manage your cash flow to maximize the tax and market opportunities to accumulate wealth. From identifying levels of risk tolerance to exploring the investment vehicles available to you, we provide a clearer picture of how to grow a nest egg by investing it. *This session is open to all faculty clinicians and researchers.*

Protect Well (Session 3 of 3)  
June 23 | 12:00-1:00pm  
In this third of three sessions on financial wellness for faculty, we will cover how you can protect your ability to make and save money. Even more importantly, we cover how you can protect yourself financially against the unexpected hardships that life can throw your way. Learn the financial risk factors associated with transitions from active practice to active retirement, and how you can successfully address end of life financial and estate planning issues. *This session is open to all faculty and is especially appropriate for mid-senior career clinicians and researchers.*

*These sessions are facilitated by Baystate Financials. Sessions are for informational purposes only- there is no expectation of purchasing of services.*



### One class, many levels: Teaching learners from 'I got it' to 'I'm totally lost'—all in one session

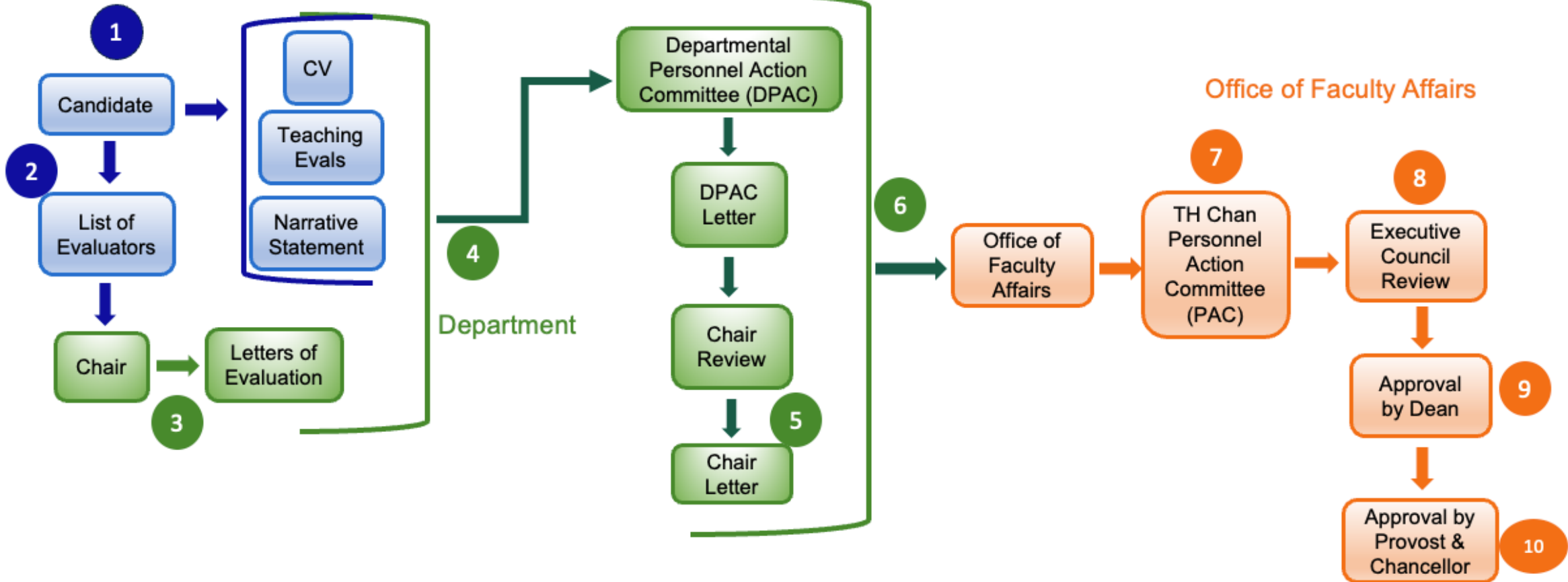
REGISTER

May 20 | 12:00-1:00pm  
In-Person, Medical School S1-608  
Presenter: Lisa Hall, PhD

This workshop will explore a subject that many educators have found challenging – how do you engage and teach students who are widely stratified in their mastery or understanding of a subject in a single session? The workshop will provide several examples of challenging content, demonstrate several ways educators might attempt to simultaneously “teach all learners,” and discuss approaches that seem to work. Throughout the

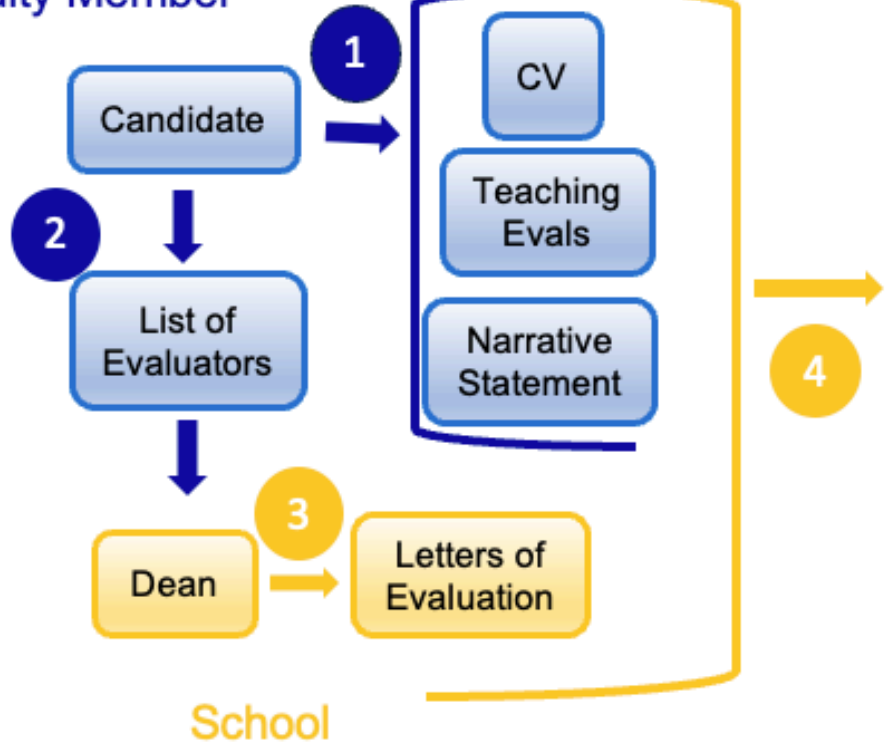
# TH Chan School of Medicine

## Faculty Member

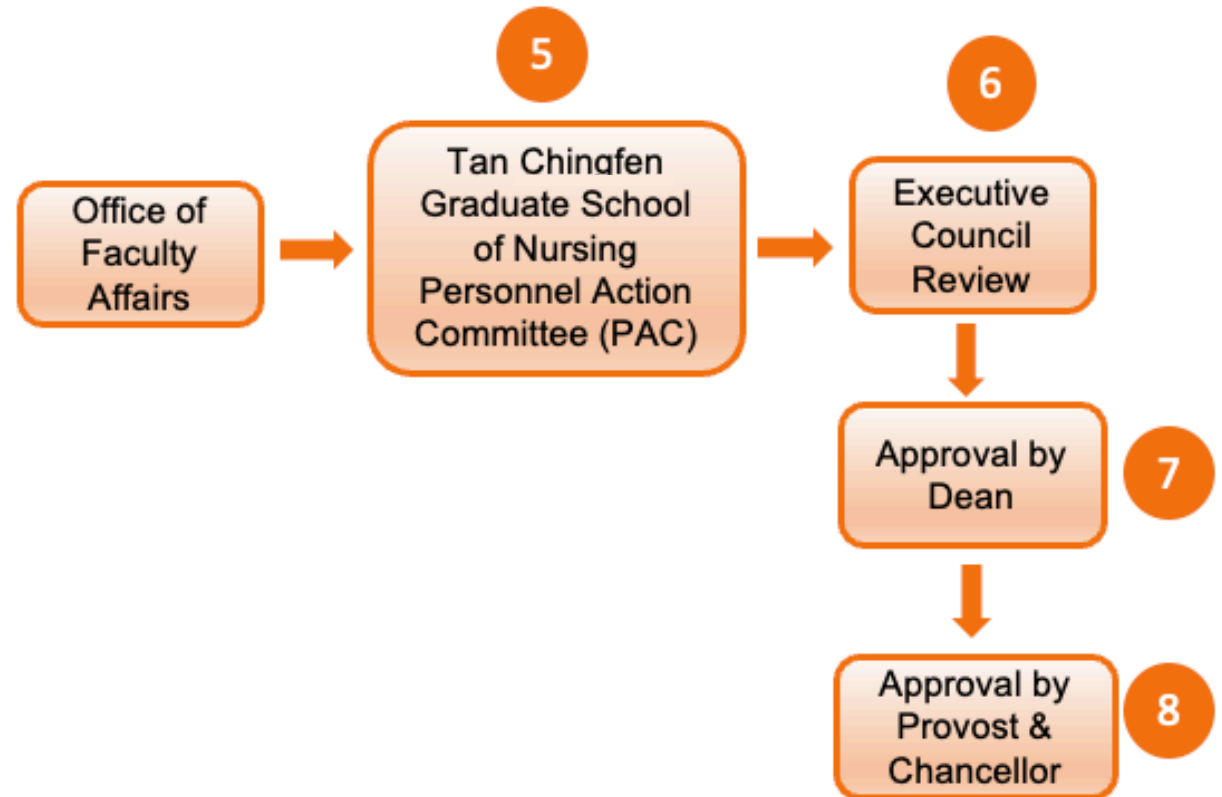


# Tan Chingfen Graduate School of Nursing

## Faculty Member



## Office of Faculty Affairs



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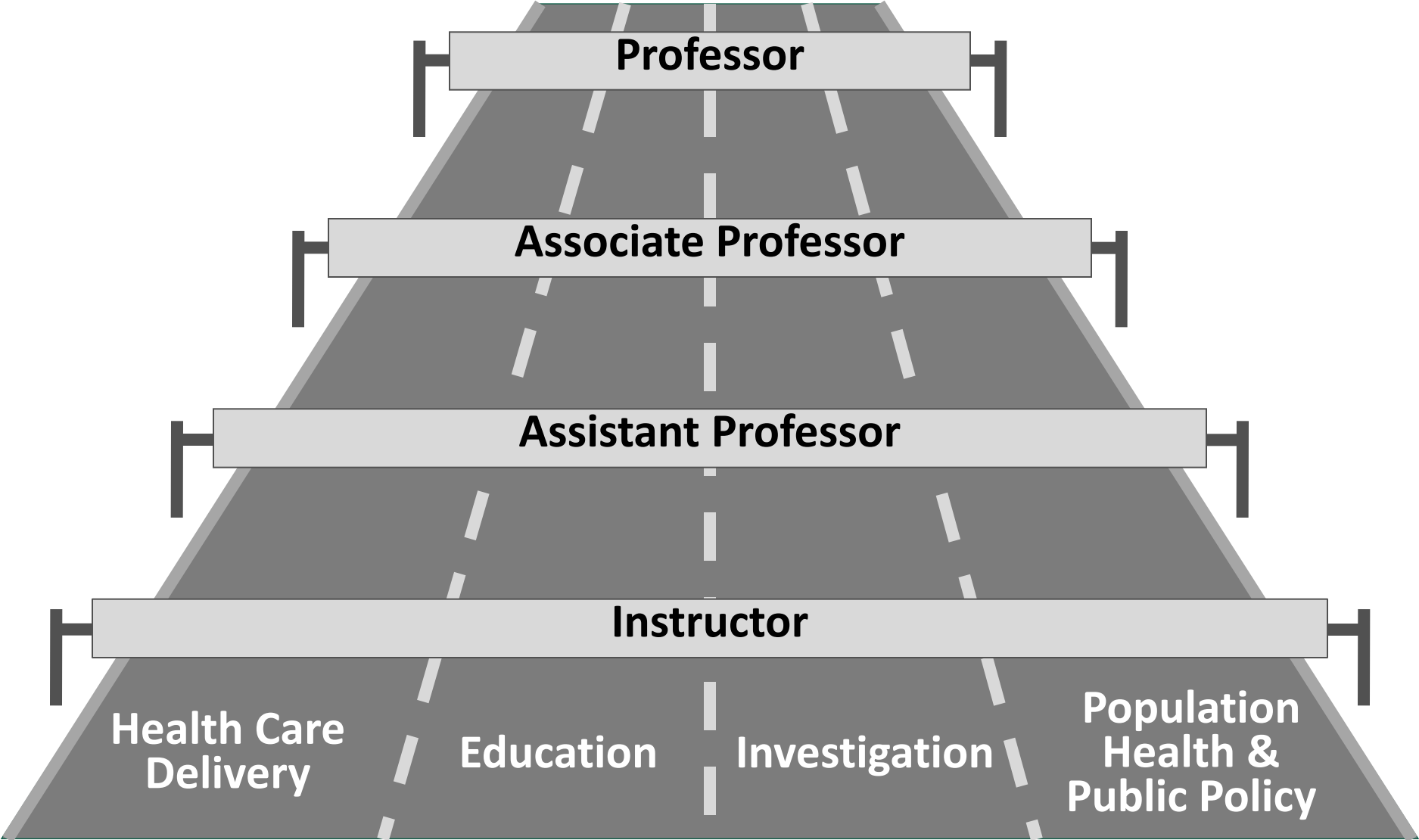
**ACADEMIC PERSONNEL POLICY  
OF THE  
UNIVERSITY OF MASSACHUSETTS MEDICAL SCHOOL**

Document T95-022  
as Amended by the Board of Trustees  
December 8, 2017

**A little light reading for you...**

- Provides definition of academic ranks
- Defines criteria for appointment, promotion and tenure
- Describes procedures for review and decisions
- Defines employment terms and conditions

# 4 Areas of Distinction



## Criteria for promotion includes:

*Within your  
Area of  
Distinction*

- **Activities** that demonstrate **Excellence**
- A record of **Scholarship**
- Academic **Reputation** (local, regional, national, international)
  
- **Education**
- **Academic Service**

# Scholarship is required in each Area of Distinction

## Examples:

- ✓ peer-reviewed publications
- ✓ books, book chapters, textbooks and reviews
- ✓ evidence-based products such as policy statements, safety and quality studies, innovations in patient care, and clinical guidelines

# Scholarship is required in each Area of Distinction

## Examples:

- ✓ peer-reviewed publications
- ✓ books, book chapters, textbooks and reviews
- ✓ evidence-based products such as policy statements, safety and quality studies, innovations in patient care, and clinical guidelines
- ✓ innovative educational materials published in print or other media
- ✓ patents, new therapies and technologies
- ✓ invited presentations and presentations at professional meetings
- ✓ Other

# Evidence of academic reputation is required in each AOD

- Invited presentations and presentations at meetings
- Honors and Awards
- Academic Service activities
- External Letters of Evaluation

# Evidence of academic reputation is required in each AOD

- Invited presentations and presentations at meetings
- Honors and Awards
- Academic Service activities
- External Letters of Evaluation

*Academic reputation is expected to expand with academic rank*

<b>Local</b>	<b>within UMass Chan and its affiliates</b> including Baystate, Lahey, Cape Cod, etc.
<b>Regional</b>	<b>New England</b> (CT, MA, ME, NH, RI, VT), including Worcester (e.g., WPI)
<b>National</b>	<b>within USA</b> including national meetings in NE
<b>International</b>	<b>outside USA</b> including international meetings in USA

**Table 1. Examples that Provide Evidence of Achievement at Each Level in Health Care Delivery**

Entry Level
<ul style="list-style-type: none"><li>• Competence in a clinical specialty, as demonstrated by <i>local</i> recognition for contributions to health care delivery</li><li>• Advanced degrees (e.g., MPH, MHA) and/or certification in clinical practice or related areas</li><li>• A record of scholarship* that may include, but is not limited to, the following:<ul style="list-style-type: none"><li>◦ Peer-reviewed publications, usually as first and middle author, case reports, book chapters and/or reviews</li><li>◦ Invited presentations and presentations at professional meetings</li></ul></li></ul>
Established Level
<ul style="list-style-type: none"><li>• Expertise in a clinical specialty, as demonstrated by <i>local/regional</i> recognition for contributions to health care delivery</li><li>• Clinical consulting and referrals <i>locally/regionally</i></li><li>• Major responsibility for and/or leadership of a clinical program and/or quality improvement initiative(s)</li><li>• Development and implementation of innovative approaches that improve safety, quality and/or efficacy of healthcare delivery, and/or coordination of care across disciplines, with <i>local/regional</i> impact</li><li>• Development and implementation of a unique clinical program, diagnostic test, and/or intervention with documented outcomes and <i>local/regional</i> impact</li><li>• Funding to support innovations that influence clinical practice and/or health care or to support clinical or translational research as a contributor to team projects</li><li>• A contributing role in patient-oriented or other area of research, including industry-supported clinical trials</li><li>• Collaborations or defined role in team or multi-center projects or programs in health care delivery, <i>locally/regionally</i></li><li>• Identification by peers as a role model in clinical practice and professionalism</li><li>• <i>Local/regional</i> honors and awards for health care delivery or clinical practice</li><li>• A record of scholarship* that may include, but is not limited to, the following:<ul style="list-style-type: none"><li>◦ Peer-reviewed publications, usually as first and senior author, case reports, book chapters and/or reviews</li><li>◦ Invited presentations and presentations at professional meetings</li><li>◦ Guidelines and/or protocols for patient treatment or delivery of care</li><li>◦ Evidence-based products such as safety and quality studies, standards of care, policies, protocols, and/or models of care coordination</li></ul></li></ul>
Senior Level
<ul style="list-style-type: none"><li>• Expertise in a clinical specialty, as demonstrated by <i>national/international</i> recognition for contributions to health care delivery</li><li>• Clinical consulting and referrals <i>regionally/nationally</i></li><li>• Leadership of a clinical program and/or quality improvement initiative(s)</li><li>• Development and implementation of innovative approaches that improve safety, quality and/or efficacy of healthcare delivery, and/or coordination of care across disciplines and institutions, with <i>regional/national</i> impact</li><li>• Development and implementation of a unique clinical program, diagnostic test, and/or intervention with documented outcomes and <i>regional/national</i> impact</li><li>• Funding to support innovations that influence clinical practice and/or health care or to support clinical or translational research as the principal investigator</li><li>• Leading role, often as principal investigator, in patient-oriented or other area of research, including industry-supported clinical trials</li><li>• Collaborations and/or defined role and/or leadership in design of studies, conduct of study and/or analysis of data for team or multi-center studies, <i>regionally/nationally</i></li><li>• Identification by peers as a role model in clinical practice and professionalism</li><li>• <i>National and/or international</i> honors and awards</li><li>• A sustained record of scholarship* that may include, but is not limited to, the following:<ul style="list-style-type: none"><li>◦ Peer-reviewed publications, usually as first and senior author</li><li>◦ Books, book chapters and/or reviews</li><li>◦ Invited presentations and presentations at professional meetings, <i>nationally and/or internationally</i></li><li>◦ Guidelines and/or protocols for patient treatment or delivery of care</li><li>◦ Evidence-based products such as safety and quality studies, standards of care, policies, protocols, and/or models of care coordination</li></ul></li></ul>

\* The record of scholarship may include defined contributions to the scholarship of team projects

Table 1. Health Care Delivery

Table 2. Education

Table 3. Investigation

Table 4. Population Health & Public Policy



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## Promotion to Associate Professor Health Care Delivery AOD

### **Established Level in Health Care Delivery**

#### **Excellence** in a clinical specialty with *local/regional* impact:

- Major responsibility for and/or leadership of a clinical program and/or quality initiative
- A unique clinical program, diagnostic test, and/or intervention with documented outcomes
- Innovative approaches that improve safety, quality, and/or efficacy of healthcare delivery
- A defined role in patient-oriented or other area of research
- Funding for innovations in health care delivery, clinical, and/or translational research as a principal investigator, co-investigator, or contributor to team projects
- A defined role and/or leadership in team or multi-center projects in health care delivery
- Identification by peers as a role model in clinical practice and professionalism

#### A record of **scholarship** that may include:

- Peer-reviewed publications, usually as first and senior author, case reports, book chapters, and/or reviews
- Safety and quality studies, standards of care, policies, models of care coordination, guidelines, and/or protocols for patient treatment or delivery of care

#### *Local/regional* **recognition** for clinical expertise/health care delivery:

- Clinical consulting and referrals
- Honors and awards for clinical expertise and/or health care delivery
- Invited presentations and presentations at professional meetings

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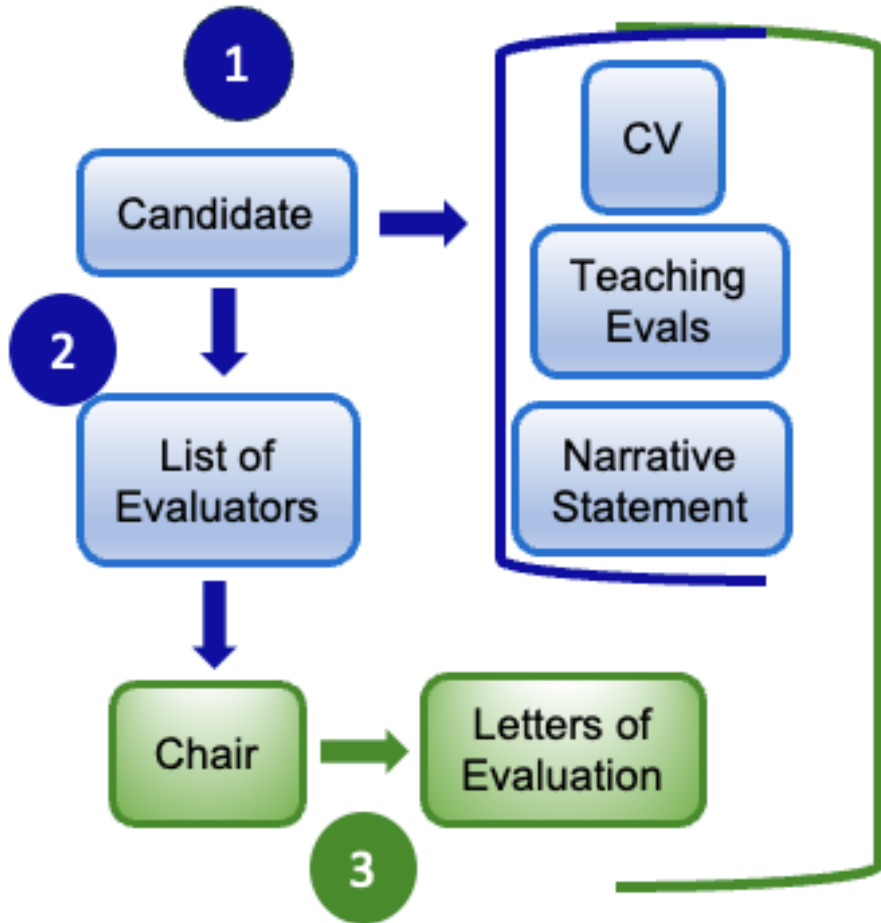
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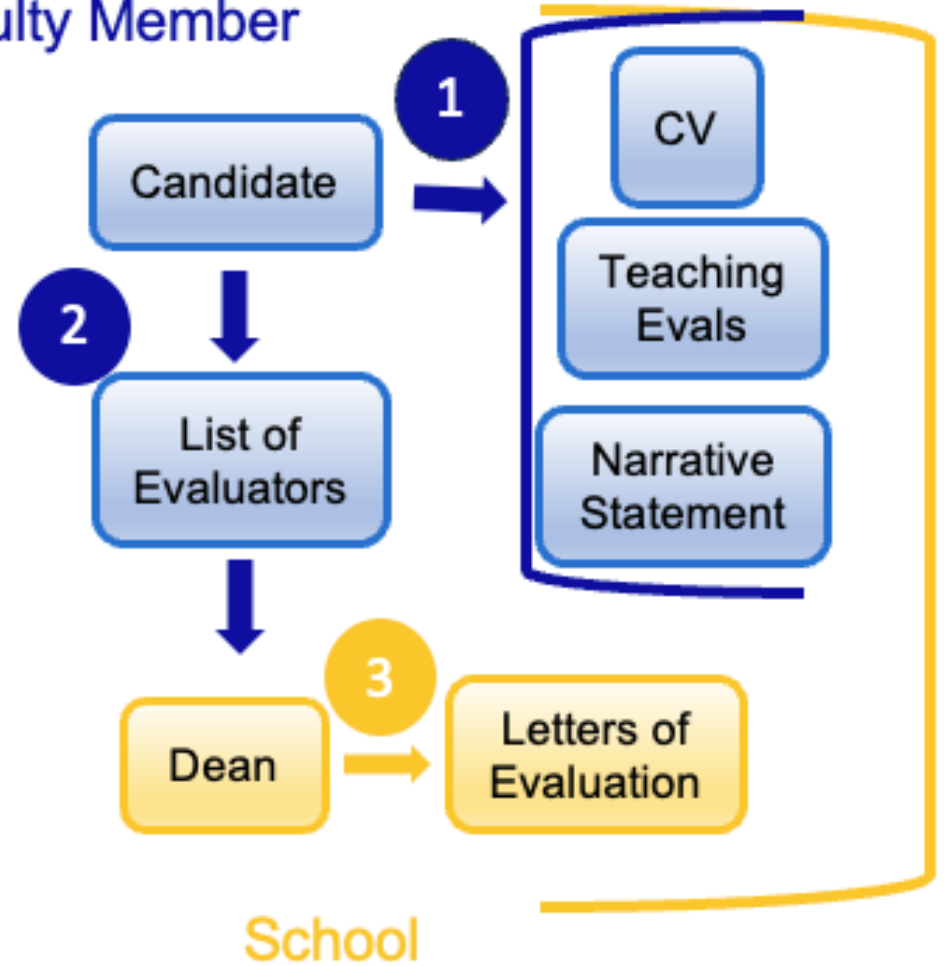
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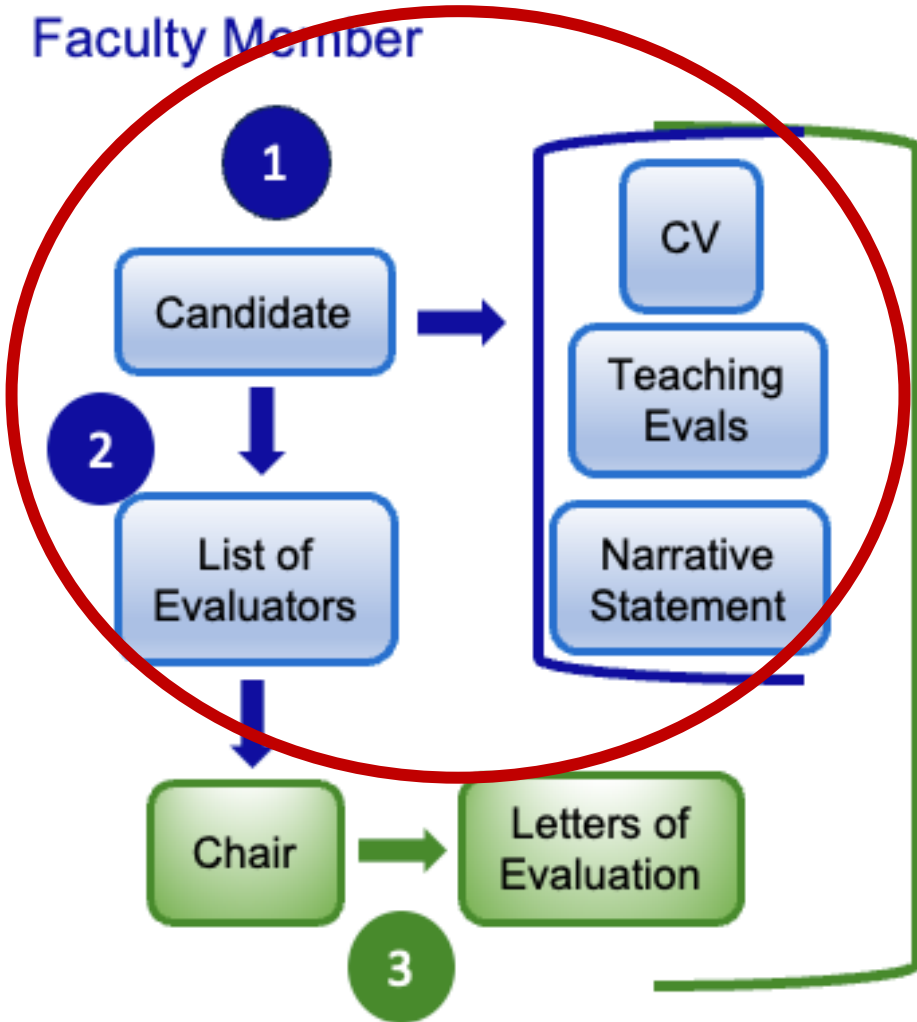
Faculty Member



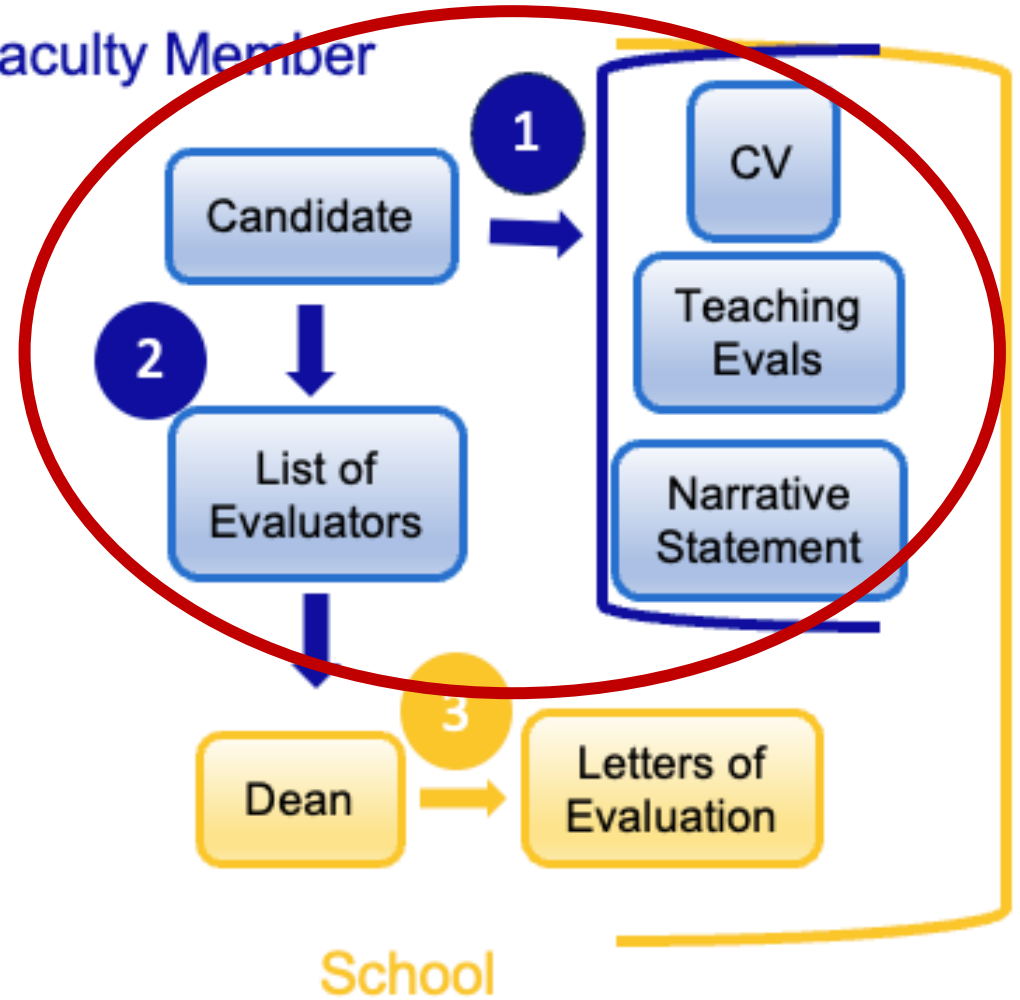
Faculty Member



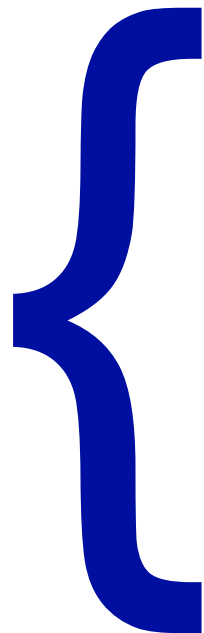
Faculty Member



Faculty Member



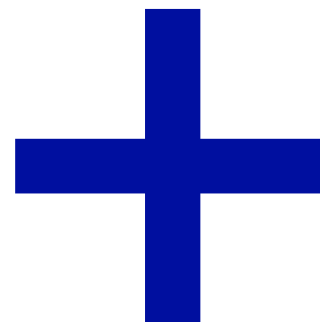
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**CV**

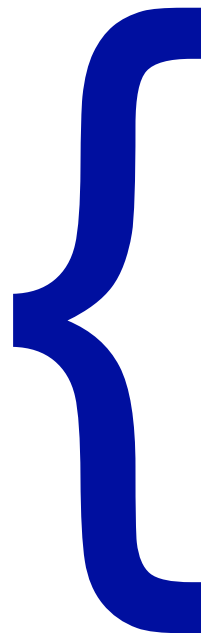
**Teaching  
Evaluations**

**Narrative  
Statement**



**List of  
Evaluators**

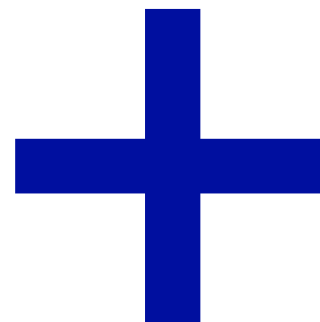
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**CV**

**Teaching  
Evaluations**

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Statement**



**List of  
Evaluators**

# Your CV is a comprehensive record of your achievements

Using the institutional format allows for fair & equitable review across all faculty



## Susan A. Jones, M.D., Ph.D.

Department of Community Medicine  
UMass Chan Medical School  
55 Lake Avenue North  
Worcester, MA 01655  
Phone: (508) 856-1301  
[susan.j@gmail.com](mailto:susan.j@gmail.com)

Only include professional address and contact information

### Education

M.D., University of Massachusetts Medical School, Worcester, MA	6/2005
Ph.D. (Neuroscience), Graduate School of Biomedical Sciences, University of Massachusetts Medical School, Worcester, MA	6/2003
Thesis: "The function of dopamine in regulating cerebral blood flow" Advisor: Dudley Cook, PhD	

Uses institutional naming that was correct at that time

B.S., Psychology (magna cum laude), Allegheny University, Pittsburgh, PA 5/1998

### Postdoctoral Training

Postdoctoral Scholar, Department of Biochemistry, University of Pittsburgh School of Medicine, Pittsburgh, PA. Supervisor: Lucinda Earle, PhD 7/2009–6/2012

Residency in Family Medicine, Lancaster General Hospital, Lancaster, MA 7/2005–6/2008

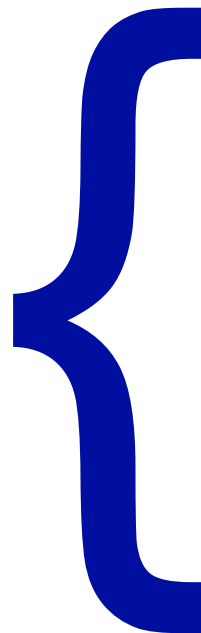
### Academic Appointments

Assistant Professor, Departments of Community Medicine and Genetics, UMass Chan Medical School, Worcester, MA 7/2012–present

### Other Positions and Employment

Staff Physician, Franklin Health Clinic, Lancaster, MA 7/2008–6/2009

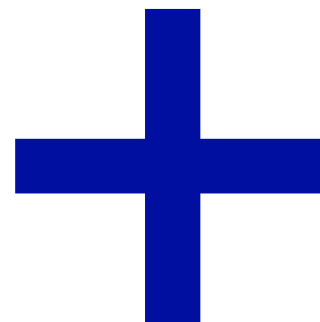
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**CV**

**Teaching  
Evaluations**

**Narrative  
Statement**



**List of  
Evaluators**

# Teaching evaluations provide evidence of educational effectiveness

CV = list of educational activities  
(i.e. contribution to the educational mission of the institution)

Susan A. Jones, M.D., Ph.D.  
Department of Community Medicine  
University of Massachusetts Medical School  
55 Lake Avenue North  
Worcester, MA 01655  
Phone: (508) 855-1301  
FAX: (508) 855-2129  
susan.jones@umassmed.edu

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Education	
Residency in Family Medicine, Lancaster General Hospital, Lancaster, MA	2001-2004
M.D., University of Massachusetts Medical School, Worcester, MA	2001
Ph.D. (Neuroscience), Graduate School of Biomedical Sciences, University of Massachusetts Medical School, Worcester, MA	1999
Thesis: "The function of dopamine in regulating ventral striatal flow"	
Advisor: Dudley Cook, Ph.D.	
B.S. in Psychology (magna cum laude), Allegheny University, Pittsburgh, PA	1994

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Appointments	
Associate Medical Director, Ocular Health Center, Worcester, MA	2010-present
Assistant Professor, Departments of Community Medicine and Genetics, University of Massachusetts Medical School, Worcester, MA	2008-present
Postdoctoral Scholar, Department of Biochemistry, University of Pittsburgh School of Medicine, Pittsburgh, PA, Supervisor: Lucinda Ecker, Ph.D.	2005-2007

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Other Positions and Employment	
Staff Physician, Franklin-Heath Clinic, Lancaster, MA	2004-2005

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Certification and Licenses	
Diplomate, American Board of Family Medicine	2004
Commonwealth of Massachusetts, Medical License	2001

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Honors and Awards	
Alpha Omega Alpha Inductee, Massachusetts Eye Chapter, University of Massachusetts School of Medicine	2001
Outstanding Dissertation Award, Graduate School of Biomedical Sciences, University of Massachusetts Medical School, Worcester, MA	1999

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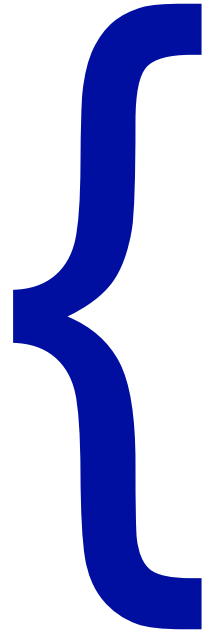
Professional Memberships and Activities	
Massachusetts Academy of Family Physicians	2004-present
Member, Research Committee	2006-present
American Academy for Family Physicians	2007-present
Society for Neuroscience	1998-present

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Editorial Responsibilities	
Reviews, Brain Research	2008-present



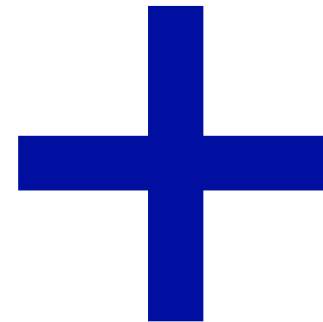
“Basic File”



**CV**

**Teaching  
Evaluations**

**Narrative  
Statement**



**List of  
Evaluators**

# The Narrative Statement is an opportunity to highlight your accomplishments and put them into context

Personnel Action Committees won't necessarily know who you are or what you do.

*Introduce yourself.*

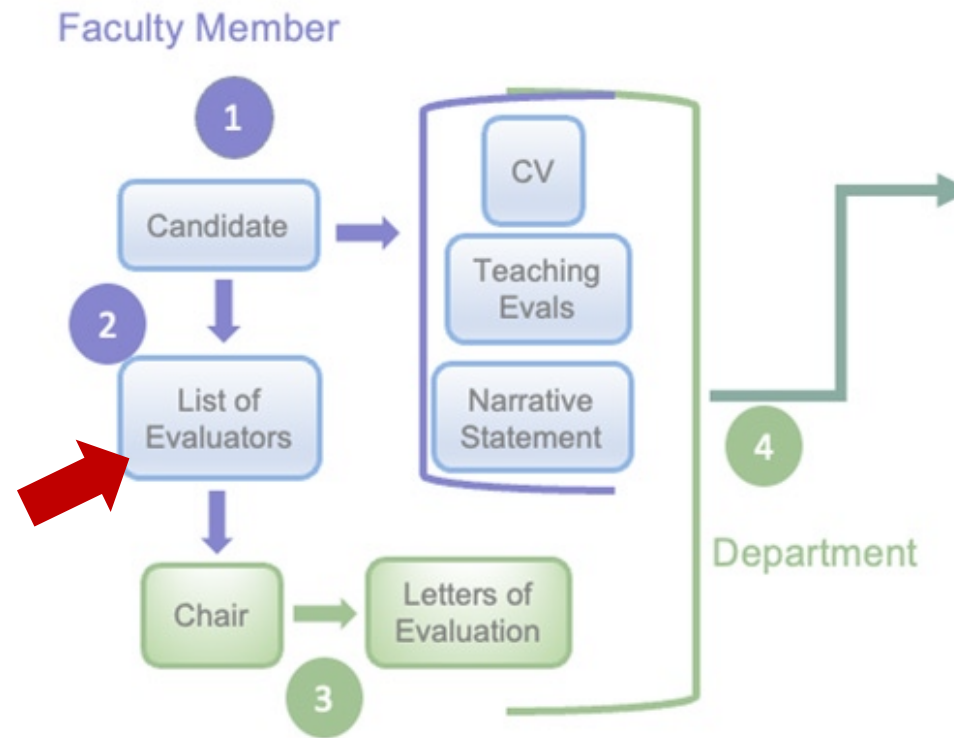
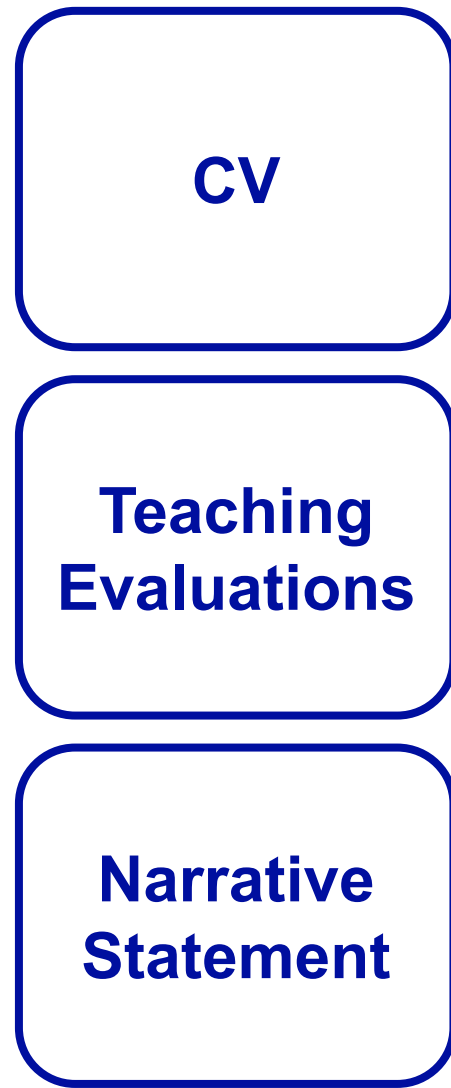
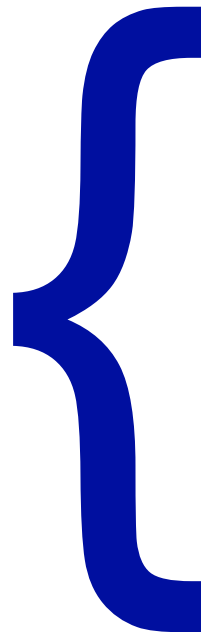
# The Narrative Statement is an opportunity to highlight your accomplishments and put them into context

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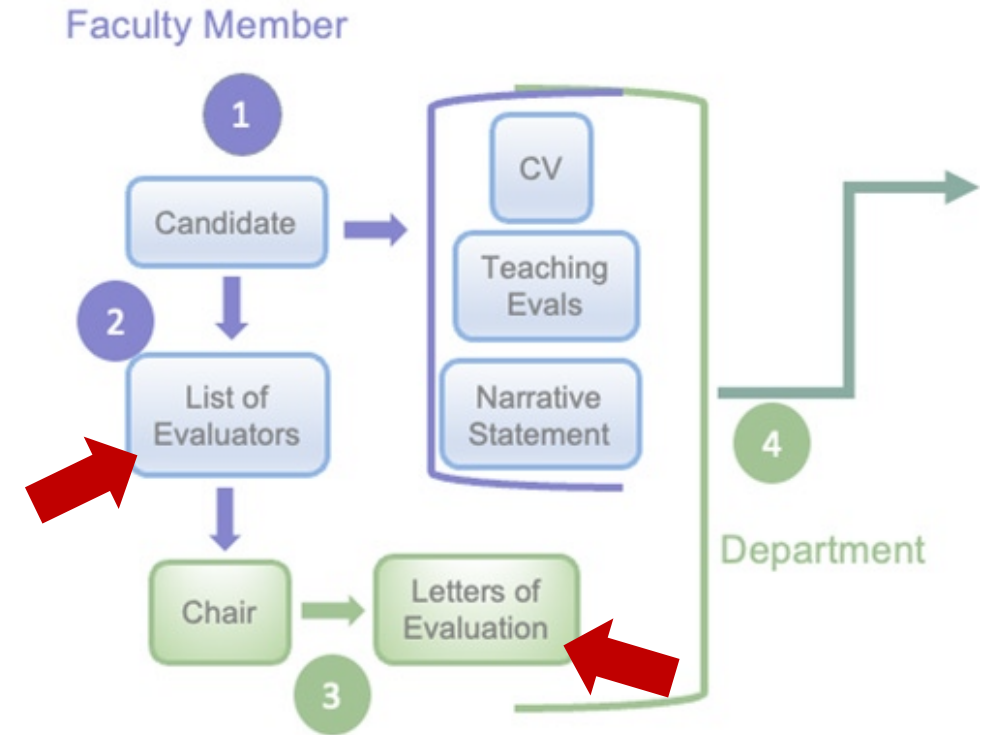
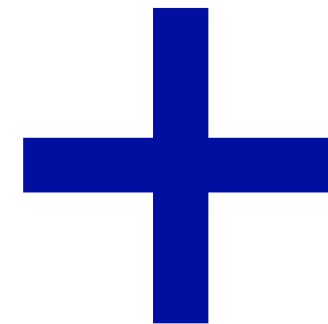
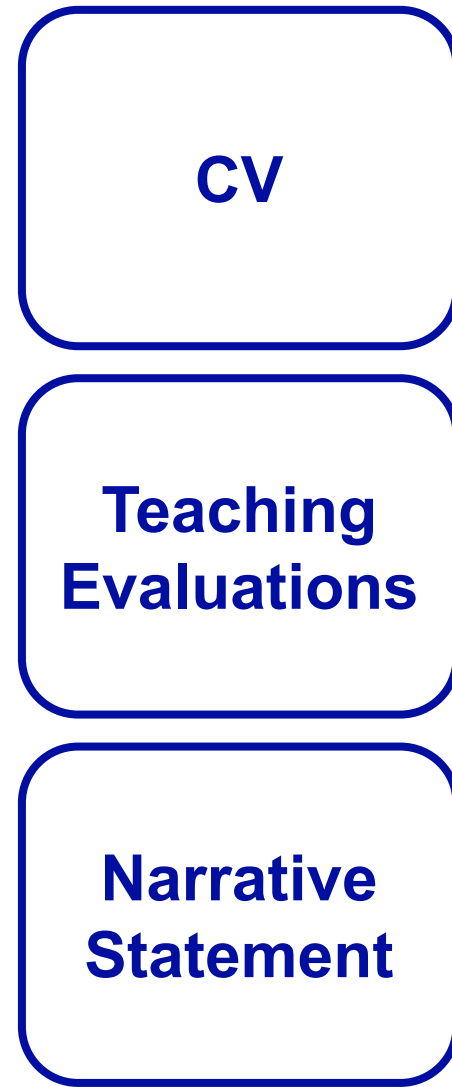
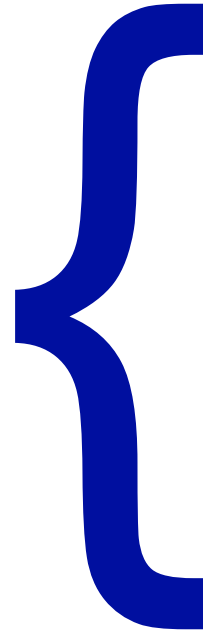
*Introduce yourself.*

- ✓ Describe your accomplishments & their significance
- ✓ Highlight accomplishments briefly noted in your CV
- ✓ Explain any changes in career direction or pathway
- ✓ Provide a summary of your role within the organization

“Basic File”



“Basic File”



**You provide a proposed list of letter writers  
to your Chair/Dean**

*The chair may select from  
the candidate's list  
&/or add other evaluators*



NAME  
TITLE  
AFFILIATION  
ADDRESS  
EMAIL  
TELEPHONE #

# Letters of Evaluation fall into 3 categories

**Category 1:** Attestations

**Category 2:** Unbiased External Evaluations

**Category 3:** Teaching & Mentoring

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**Category 1:** Attestations

**Category 2:** Unbiased External Evaluations

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## Minimum Requirements for Letters

Personnel Action	Category 1	Category 2	Category 3
Appointment/promotion to Instructor/Assistant Professor	minimum 3	not required	any number
Appointment/promotion to Associate Professor/Professor	minimum 3	minimum 3	any number
Award of <b>Tenure</b>	any number	minimum 5	any number



1

## **Promotion & the Promotion Process**

Know the process

Make a plan for career  
development and  
academic advancement

2

## **Criteria for Promotion**

3

## **Preparing for Promotion**

1

## Promotion & the Promotion Process

Know the process  
Make a plan for career development and academic advancement

2

## Criteria for Promotion

Use your annual review strategically to discuss your goals  
Talk with mentors and Chairs about readiness

3

## Preparing for Promotion

①

## Promotion & the Promotion Process

Know the process  
Make a plan for career development and academic advancement

②

## Criteria for Promotion

Use your annual review strategically to discuss your goals  
Talk with mentors and Chairs about readiness

③

## Preparing for Promotion

Keep your basic file materials updated and complete



**[Emily.Green@UMassmed.edu](mailto:Emily.Green@UMassmed.edu)**