

**OREGON HEALTH & SCIENCE UNIVERSITY
POSITION DESCRIPTION
UNCLASSIFIED ACADEMIC PERSONNEL**

New position: Revised position: Effective Date: 7/27/2026
Prepared By: Date Prepared: 11/17/2025
Faculty Name:
Executive Unit: School of Medicine Dept/Division: SM. Otolaryngology
Primary Dept. Rank: Faculty Working Title: Laryngology Fellow
Choose an item. Click or tap here to enter text. Type of Appointment: Fixed-Term
Appointment(s):
Regular 12 month contract: 9 month (3 month leave each year) contract: Temporary contract:
Dates of Appointment: 7/27/2026 through 7/31/2027
Annual Salary (1.0 FTE): \$118,650 FTE: 1.0
For more information please contact: Carter Michell
Mail Code: SJH01 Phone: 503-494-0350

Position Description:

The appointee shall provide services as assigned by the supervisor in furtherance of the university's missions and goals of teaching, research, patient care, outreach and public service.

This position reports to (supervisor):

The duties of this position include:

This is a comprehensive one year training program that encompasses a wide spectrum of voice, airway and swallowing problems. Fellows work closely with members of the Head and Neck team as well as the Head and Neck Tumor Board, creating comprehensive treatment plans in conjunction with a variety of other physicians and surgeons, including members of our microvascular team, gastroenterologists, pulmonologists, radiation and medical oncologists.

In the clinic, fellows learn to perform advanced procedures, including transnasal esophagoscopy, esophageal dilation, injection laryngoplasty, laryngeal EMG with botulinum treatment and transnasal laser laryngoscopy with both KTP and fiber-based CO2 lasers. Within the hospital, laryngology fellows work with our residents to evaluate laryngeal problems on hospital consults, manage complicated airway problems and perform both percutaneous tracheotomies as well as percutaneous endogastric tube placements.

Position Conditions/Qualifications:

Completion of ACGME accredited residency in Otolaryngology.

Ability to obtain an Oregon Medical License and DEA

Please Mark All that Apply for this Position:

The following statements are commonly included in various Notices of Appointment, if they apply. To make sure the Notice is properly prepared, mark those paragraphs to be included. If you have questions, please contact OHSU Faculty Affairs.

- Duration of this appointment and indicated salary may be changed or eliminated if gift, grant, or contract funds supporting this position become unavailable.
- This position requires undivided effort at the specified FTE level.
- This Notice of Appointment is subject to the terms and conditions of the letter dated _____, a copy of which is attached (*send a copy of documents to be appended*).





February 4, 2026

Dear Dr.

I am very pleased to offer you a position as a fellow and faculty member of the Department of Otolaryngology-Head & Neck Surgery in the School of Medicine at Oregon Health & Science University (OHSU). This letter outlines your appointment, compensation, and duties as a faculty member in the Department. All faculty positions at OHSU require a Notice of Appointment (NOA) which outlines the general terms of your appointment. A sample of an applicable NOA is enclosed. This offer letter, your NOA, and the enclosed Terms and Conditions of Clinical Employment collectively comprise the terms of this offer and subsequent employment.

Your faculty appointment at OHSU will be at the rank of Instructor. If eligible, you may apply for a tenure-track appointment pursuant to the attached Promotion and Tenure Guidelines for the School of Medicine at OHSU. The position will be a full time, 1.0 FTE and, like all other appointments, is a fixed-term appointment which is annually reviewed by OHSU. The initial term of the appointment is from your expected start date of July 27, 2026 through June 30, 2027. Following this initial term of appointment, your faculty appointment and employment contract will annually renew each July 1 unless you are otherwise notified prior to the expiration of the contract year. Your fellowship year will run from July 27, 2026 through July 31, 2027.

This offer, and any employment start date, is contingent on the following: (1) that you obtain medical staff privileges¹ at OHSU, and Portland VA; (2) an unrestricted medical license with the state of Oregon²; (3) a current Drug Enforcement Administration (DEA) license³; (4) an updated National Provider Identification Number (NPIN) reflecting your updated taxonomy and location; and (5) your successful completion of all OHSU screening processes and reference checks, which include pre-employment criminal background checks and drug testing.

If you accept this offer, there are a series of pre-hire requirements you will need to complete as part of onboarding with OHSU's Occupational Health team. Please review the Occupational Health onboarding page on the OHSU website for more information.

¹ It is our expectation that your start date will coincide with obtaining medical staff privileges. In the event that medical staff privileges are not obtained or there are unanticipated delays, we reserve the right to change your start date.

² Please note that this a process takes approximately **75 days** to complete and plan accordingly. Privileging and enrollment take approximately 90 days from submission of a completed application. Faculty members must have active board certification in their practice specialty to obtain and maintain medical staff privileges.

³ Please note that OHSU currently holds a fee-exempt status with the DEA. If applying for or renewing your license, please be sure to indicate this on the application.

School of Medicine

Department of Otolaryngology-Head and Neck Surgery

Mail code: PV01
3181 S.W. Sam Jackson Park Rd
Portland, Oregon 9723-3098

tel: 503 494-8510
fax: 503 346-6826
www.ohsu.edu

Timothy L. Smith, M.D., M.P.H.
Professor and Chairman
tel: 503 494-7413
fax: 503 346-6826

CLINICAL DIVISIONS

tel: 503 494-8510
fax: 503 346-6826

Facial Plastic and Reconstructive Surgery

Tom D. Wang, M.D.
Myriam Loyo, M.D.
Natalie Krane, M.D.
Lauren Ramsperger, PA-C

Head and Neck Surgery

Peter E. Andersen, M.D.
Daniel R. Clayburgh, M.D. Ph.D.
Ryan J. Li, M.D., M.B.A.
Mark K. Wax, M.D.
Sara Yang, M.D.
Ryan Hellums, D.O.
Romilla Bijlani, M.S., PA-C
Michael Schuller, PA-C

NW Clinic for Voice and Swallowing

Joshua S. Schindler, M.D.
Gabriela Lilly, M.D.
Donna Graville, Ph.D., M.S.
Kate Zochowski PA-C

Oregon Sinus Center

Timothy L. Smith, M.D., M.P.H.
Kara Detwiller, M.D.
Mathew N. Geltzeiler, M.D.
Lindsay E. Wyant, M.S., PA-C
Emily Reed, PA-C

Otology/Neurotology/ Skull Base Surgery

Yael Raz, M.D.
Jay Gantz, M.D.
Margaret Peters, PA-C

Pediatric Otolaryngology

Carol J. MacArthur, M.D.
Derek J. Lam, M.D., M.P.H.
Lourdes Quintanilla-Dieck, M.D.
Christopher Hargunani, M.D.
Brooke Su-Velez, M.D., M.P.H.
Yuna Kim, M.D.
Monica N. Deshpande, APN, FNP
Valerie Kimbrough, PA-C
Rachael Masterson, PA-C

Thyroid and Parathyroid Center

Maisie L. Shindo, M.D.
Dana L. Madison, M.D.
Olga S. Senashova, M.D.

General Otolaryngology

Jennifer March, M.D., M.S.

RESEARCH DIVISIONS

Oregon Hearing Research Center

Laurence Trussell, Ph.D.
Professor and Interim Director

Compensation & Benefits:

For your 1.0 FTE appointment as an Instructor Fellow, we are offering you an initial annual total salary of \$118,650. Your initial annual salary will be paid in bi-weekly installments (26 pay periods in a calendar year). Compensation is reviewed annually.

One way that OHSU recognizes your role in achieving its mission is by providing to you the comprehensive OHSU benefits package. The benefits package is an important part of your total compensation and offers several ways to maintain a degree of financial stability for yourself and your family. The benefits package also offers flexibility that lets you choose the level of coverage you need. You and eligible family members, including domestic partners, may enroll in medical, dental, vision, and life insurance benefits effective the first day of the month following your date of hire. Additional information regarding the benefits package is available in the attached benefits summaries. Your employee benefits will also be covered in detail during OHSU's New Employee Orientation that you will be expected to attend upon arrival.

Space and Support:

The Department will work with you for provision of office space, support staffing, computer, E-mail, white coats, business cards and stationery. Department space and similar support is reviewed at least annually and subject to Department budgets and discretion.

Professional Development:

The Department, in addition to your salary, may provide an annual allowance for business and professional meetings or expenses. The department administrator must approve expenses in advance. The maximum allowance amount is \$5,000. This allowance includes conferences, course travel, registration, and lodging. The department does not cover board exam costs, out of state licensing, equipment, computers, trainings not related to Otolaryngology, or other personal items. Any cost beyond the maximum allowance is the responsibility of the fellow.

Duties and Responsibilities:

As a member of the Department of Otolaryngology-Head & Neck Surgery you will report to the Laryngology Fellowship Director, and will be expected to contribute in each of the following areas:

1. Administration. Administrative and other duties may be assigned based on department needs and your areas of expertise and interest, including opportunities to participate in departmental management and to serve on institutional committees.
2. Clinical. The Clinical Director for the Department will assign your clinical schedule. You will work as a Fellow (option: specialist) within the Department. You will also be expected to take your fair share of call, as assigned, with other faculty on nights, weekends, and holidays.
3. Education. OHSU is a teaching facility and you will be expected to teach medical students and residents in the clinical setting as well as through assigned lectures to be given during the course of the year. You will receive your teaching assignments from the Director of Education.
4. Research. There are resources available for start-up research and on-going support via established processes and opportunities. Faculty interested in doing research may be eligible to apply for departmental research assistance and non-clinical time through the Director of Research.

All the specifics of this offer provided above are subject to your continued employment. In accordance with OHSU policies, your appointment may be changed or eliminated due to changes in available funding, restructuring or reorganizing, or just cause. All OHSU members are subject to ongoing performance review by their Chair or Division Head, and you will be expected to meet goals, where applicable, in our three fundamental missions of teaching, patient care, and research.

We regard this as an exciting and new opportunity, and hope you will decide to join us. If you have any questions or concerns arising from this letter or our previous discussion, please do not hesitate to contact me. I look forward to your response.

Sincerely,

Tim Smith, M.D.
Professor and Chair
OHSU Department of Otolaryngology – Head and Neck Surgery

**I accept the offer as described above.
I also acknowledge receipt of the appendixes listed below.**

Date

Anticipated start date: July 27, 2026

Appendices:

1. Terms and Conditions of Clinical Employment
2. Sample NOA
3. School of Medicine Promotion & Tenure Policy
4. School of Medicine Promotion & Tenure Guidelines
5. Faculty Benefits Summary

APPENDIX:
TERMS AND CONDITIONS OF CLINICAL EMPLOYMENT

EFFECTIVE DATE: 7/27/2026

PARTIES:

**Oregon Health & Science University
3181 SW Sam Jackson Park Road
Portland, OR 97239**

Hereafter “OHSU”

Clinician

Hereafter “Clinician”

Department of Otolaryngology

Hereafter “Department”

OHSU provides clinical services by and through skilled and licensed clinical practitioners employed by OHSU according to and consistent with agreed upon terms and conditions of employment.

Clinician is a skilled and licensed clinical practitioner and desires and agrees to provide professional services to, for and on behalf of OHSU as an employee OHSU in Department subject to and consistent with the Terms and Conditions of Clinical Employment (“T&Cs”) as set out below.

OHSU and Clinician agree to the following T&Cs:

1. Term. These T&Cs shall commence on the above Effective Date and shall continue in effect for so long as Clinician is employed by OHSU.

2. Clinician Duties. Clinician shall have the following duties:

- 21 To actively engage in clinical practice authorized by and as an employee of OHSU at OHSU Hospitals and Clinics (collectively, “Hospital”) and, except as otherwise provided in this paragraph 6 of the T&Cs, not otherwise;
- 22 To comply with the bylaws, rules, regulations, resolutions, policies and standards of OHSU and the Department in effect and as may be amended from time to time, including without limitation (i) compliance programs and policies, (ii) the OHSU Patient Care policy, (iii) the OHSU Code of Conduct, (iv) the OHSU Conflict of Interest policies, (v) all policies and requirements regarding the preparation and maintenance of medical records and the billing for patient services, and (vi) OHSU Policy No. 03-30-060;
- 23 To participate in full compliance with the OHSU Practice Plan (“OPP”);
- 24 To maintain in good standing a license in the State of Oregon and any other jurisdiction and prescriptive authorities, registrations and certifications necessary in order for Clinician to perform and provide the professional services contemplated hereunder consistent with Clinician’s education, training, demonstrated competencies and authorized scope of licensed clinical practice;
- 25 To maintain medical staff privileges at Hospital and such other hospitals, patient care facilities and at such locations at which Clinician provides professional services hereunder as authorized and directed by OHSU;
- 26 To comply with (i) all applicable laws and regulations relating to the provision of health care services, practice of medicine and the billing of clinical services, (ii) all applicable standards and requirements of the OPP and any agreement entered into by OHSU for provision of patient care services pursuant to and under which Clinician provides clinical services, (iii) all requirements of any lease of clinical space occupied or used by Clinician; (iv) the directives of the Chair of the Department (“Department Chair”); and (v) any additional terms and conditions of employment provided in the Offer Letter and NOA; and
- 27 To participate in committees and perform administrative tasks as requested by, and to comply with the directives of, the OPP Board of Directors and the Department Chair.

3. Compensation; Benefits; Expense Reimbursement.

- 3.1 Compensation. As reasonable compensation for Clinician's services, OHSU shall compensate Clinician consistent with and as described in the NOA and Offer Letter and related attachments thereto.

All such compensation shall be payable consistent with OHSU's payroll practices in effect and as modified from time to time, and shall be subject to applicable withholding and employment taxes.

- 3.2 Benefits. Subject to eligibility requirements, Clinician shall be eligible for institutional benefits adopted by OHSU corresponding to Clinician's job classification and specific FTE applicable to clinical employees in effect and as modified from time to time, and as further described in the NOA and Offer Letter.

- 3.3 Expense Reimbursement. Reimbursement of expenses shall be in accordance with OHSU's policies, as they may be modified from time to time, and in accordance with any applicable Department policies.

4. Call Coverage and Continuing Medical Education (CME).

- 4.1 Call Coverage. Clinician shall provide call coverage pursuant to a schedule established from time to time by the Department Chair or as otherwise directed by such Department Chair;

- 4.2 CME; Attendance at Professional Meetings. Subject to scheduling that meets the clinical needs of the Department and OHSU, and subject to any requirements of the Clinician's Department with respect to authorization, Clinician is encouraged to participate in CME and to attend professional meetings.

5. Income. All income generated from patient care provided by Clinician, including without limitation, operations, consultations and office practice (collectively, "Professional Clinical Services"), shall belong to OHSU. Clinician shall not directly bill or collect for Professional Clinical Services, and any payment that Clinician receives for such Professional Clinical Services shall be promptly paid to OHSU. Other income derived from Clinician's services as an employee of OHSU and within the scope of Clinician's OHSU employment, including without limitation services in the form of clinical administrative services, medical or quality directorships, lecture or appearance fees, fees received as an expert witness in connection with a lawsuit or claim, and royalties from inventions and copyrights, shall belong to OHSU and be subject to all requirements set out in these T&Cs, the NOA and Offer Letter, unless mutually agreed to otherwise in writing.

6. Professional Liability. OHSU provides indemnity and defense for professional liability claims and lawsuits arising out of Clinician's performance of authorized duties and responsibilities for and on behalf of OHSU. OHSU's indemnity and defense obligation is defined by the Oregon Tort Claims Act (OTCA) codified at Oregon Revised Statutes Chapter 30 (Sections 30.260 to 30.300). The OTCA controls in all situations and supersedes the provisions of these T&Cs. "Occurrence" based coverage is available for claims arising out of patient care provided by Clinician (i) on the OHSU campus (ORS 30.267) and (ii) at locations other than the OHSU campus only if (1) the Clinician has express written authorization to provide patient care at the off-campus location from the OHSU President or representative of the OHSU President as designated in writing (e.g., Vice President of Risk Management), (2) the patient care is within the scope of the express written authorization, and (3) OHSU derives fee revenue in the same or a similar amount or percentage as it would for care rendered on the OHSU campus, or the off-campus patient care service is provided by Clinician as a salaried or a non-fee-generating volunteer public community or non-fee generating educational service (ORS 30.268). Patient care services provided at an off-campus location without such express written authorization or outside the scope of such express written authorization are not entitled to OHSU indemnity or defense. Clinician shall be responsible to obtain or otherwise arrange for liability insurance coverage for patient care activities off campus that are not authorized but are otherwise permitted by Clinician's Department Chair and consistent with OHSU's Conflict of Interest policies.

7. Sanctions and Non-renewals. Clinician may be disciplined up to and including termination of employment in accordance with OHSU Policies, including without limitation Policy Nos. 03-70-001 and 03-70-005. Nonrenewal of Clinician's appointment upon expiration of its Term results in termination of Clinician's employment at OHSU but does not itself constitute disciplinary action.

8. Confidentiality; Non-Solicitation; Patient Communication; Non-Competition.

- 8.1 Confidentiality. Clinician agrees to safeguard and not disclose confidential information relating to OHSU including patient information, personnel information, trade secrets, and other information not generally disclosed by OHSU to the public, (collectively, "Confidential Information"). Clinician shall not use Confidential Information except as necessary to perform duties hereunder or pursuant to the Faculty Appointment. Upon termination of Clinician's employment with OHSU for any reason, Clinician will promptly deliver to OHSU all Confidential Information related to OHSU, in whatever form, in Clinician's

possession and/or control. Nothing in these T&Cs shall modify Clinician's or OHSU's rights and obligations pursuant to OHSU policies regarding ownership of research data or ownership of intellectual property. Clinician acknowledges that agreements between OHSU and other entities or individuals may contemplate and/or require OHSU to provide OHSU with information concerning Clinician, including compensation, compliance and other information, and Clinician consents to such disclosure.

- 82 Non-Solicitation. During Clinician's OHSU employment and for one year following termination of Clinician from employment at OHSU for any reason, Clinician shall not directly or indirectly solicit employees of OHSU or solicit or transact business with patients of OHSU other than for the purposes of providing patient care services for and through OHSU, or otherwise cause any OHSU patient to cease or reduce their relationship with OHSU. Clinician shall not aid any person or entity in doing anything prohibited in this Section.
- 83 Patient Communication. Upon termination of Clinician's employment with OHSU, OHSU shall develop a communication plan as determined by and at OHSU's discretion, which may include consultation with Clinician, for the purpose of informing Clinician's active patients of Clinician's departure and Clinician's new practice location, if any.
- 84 Representation; Conflicts of Interest; Competition. Clinician represents and warrants that Clinician's OHSU employment consistent with the T&Cs does not conflict with or constitute a default under any agreement to which Clinician is a party, including without limitation any restriction relating to competition. During Clinician's employment, Clinician shall not undertake any effort directly or on behalf of any other person or entity, such as developing, operating, administering or consulting on projects, programs or operations, including without limitation patient care or ancillary services, which effort competes with the mission, services, or strategic direction of OHSU or which effort violates OHSU conflict of interest policies except as expressly permitted hereunder or as approved in writing by the Department Chair or OPP Board of Directors. Nothing herein requires Clinician to refer patients to OHSU hospitals or clinics. Clinician agrees to be bound by the competition restrictions, if any, following termination, as set out in the Offer Letter.
- 85 Remedies; Survival. In the event of a violation or threatened violation of this Section 8, OHSU shall be entitled to immediate injunctive or other equitable relief in addition to any other remedies to which OHSU may be entitled by law. The provisions of this Section 8 shall survive termination of the NOA and these T&Cs.

9. Miscellaneous.

- 91 Records. All patients for whom Clinician performs Professional Clinical Services at OHSU Hospitals and Clinics are patients of OHSU and all patient records pertaining thereto belong to OHSU. Following termination of Clinician's employment for any reason, Clinician shall promptly provide OHSU all assistance and information necessary to complete all patient records and billings for Professional Clinical Services rendered by Clinician.
- 92 Mediation. If a dispute exists between the parties relating to Clinician's OHSU employment or these T&Cs, the parties shall negotiate in good faith to settle the dispute by mandatory and confidential mediation before resorting to arbitration, litigation or any other dispute resolution procedure. The mediation shall be administered by a mediator selected by mutual agreement of the parties.
- 93 Choice of Law; Jurisdiction. These T&Cs shall be governed by the laws of the state of Oregon. The exclusive jurisdiction for any action to enforce or interpret this T&C that is not subject to arbitration, if any, shall be the appropriate state or federal court located in Oregon.
- 94 Integration; Amendment; Waiver. These T&Cs together with the NOA and Offer Letter (including Exhibits attached hereto and thereto, and as amended from time to time) constitute the entire agreement between the parties regarding its subject matter, and supersedes all prior and contemporaneous understandings and agreements, whether written, oral, express or implied. Except as otherwise expressly provided herein, these T&Cs may be amended only in writing, signed by Clinician and an authorized representative of OHSU. No failure on the part of either party to exercise, and no delay in exercising, any right or remedy hereunder shall operate as a waiver thereof; nor shall any single or partial exercise of any right or remedy hereunder preclude any other or further exercise thereof or the exercise of any other or remedy.
- 95 Notice. Any notice given pursuant to this T&C shall be in writing and shall be deemed given upon personal delivery or two (2) days after mailing by certified or registered U.S. Mail, return receipt requested, postage

prepaid, addressed to the party at the address printed at the beginning of this document or to such other address as may have given by one party to the other by notice in accordance with this Section.

96 Severability. If any provision of this T&C shall be held to be illegal or unenforceable, such provision shall be severed from this T&C the entire T&C shall not fail, but shall otherwise remain in full force and effect.

OREGON HEALTH & SCIENCE UNIVERSITY

NOTICE OF APPOINTMENT

UNCLASSIFIED ACADEMIC PERSONNEL

Name: [REDACTED]

Unit: Division of Laryngology

Dept./Division: Department of Otolaryngology

On Behalf of Oregon Health & Science University (OHSU), this appointment is approved as follows:

Primary Dept. Rank: Instructor

Working Title: Laryngology Fellow

Joint Appointment(s): N/A

Dates of Appointment: 07/27/26 through 07/31/27 Type of Appointment: Choose an item.

Annual Salary Rate at 1.00 FTE: \$ 118,650 Appointed at: 1.00 FTE Annual Salary: \$ 118,650 If applicable: X= \$

Tenure Salary: \$ Y= \$

Z₁= \$

The Appointee shall provide services as assigned by the supervisor in furtherance of OHSU's missions and goals of teaching, research, patient care, outreach and public service.

This position is under the general supervision of the Chair, Department of Otolaryngology, and the direct supervision of the Fellowship Director(s), Division of Laryngology.

Duration of this appointment and indicated salary may be changed or eliminated if gift, grant, or contract funds supporting this position become unavailable.

This appointment is subject to the "Conditions and Qualifications" which appear on the reverse side of this Notice of Appointment. The Appointee is required to comply with all OHSU policies and procedures, including the OHSU Code of Conduct and policies and procedures of the Appointee's school or unit, as they may be adopted or amended from time to time. **This Notice of Appointment may be renewed by a letter of notification issued prior to the expiration of its term.**

Appointee may be terminated or otherwise disciplined for cause during the term of this appointment in accordance with OHSU policies. The terms of this appointment may be adopted or amended by approved personnel action form prior to expiration of the appointment.

THIS NOTICE OF APPOINTMENT, ANY OBLIGATIONS OF OHSU AND APPOINTEE PURSUANT TO THE OFFER LETTER (A COPY OF WHICH IS MAINTAINED IN THE OFFICE OF ACADEMIC AFFAIRS AND THE DEAN'S OFFICE), THE CLINICIAN EMPLOYMENT AGREEMENT, IF APPLICABLE, AND THE OTHER DOCUMENTS REFERENCED HEREIN CONSTITUTE THE ENTIRE AGREEMENT BETWEEN THE PARTIES REGARDING THE TERMS OF THIS APPOINTMENT. THERE ARE NO UNDERSTANDINGS, AGREEMENTS, OR REPRESENTATIONS, ORAL OR WRITTEN, NOT SPECIFIED HEREIN REGARDING THIS AGREEMENT.

Date Issued: 1/21/2026

Signed: _____
Provost or Designee

I acknowledge that I have read and understand the terms and conditions of this Notice of Appointment, and that they are acceptable to me and I agree to be bound by them. **Acceptance of a paycheck constitutes acceptance of the terms of this Notice of Appointment.**

Date: _____ Signed: _____

Initials: Primary Dept. Joint Dept. Executive Staff Academic
_____ Chair/Director _____ Chair(s)/Director _____ Member _____ Affairs

CONDITIONS AND QUALIFICATIONS

Faculty appointees engaged in clinical care are required, if eligible, to join and remain a member of Faculty Practice Plan.

Professional Liability Coverage: OHSU Indemnity and Defense Obligations

OHSU provides indemnity and defense to faculty members for professional liability claims and lawsuits arising out of their OHSU duties and responsibilities. The exact scope of OHSU's indemnity and defense obligations is defined by the Oregon Tort Claims Act (OTCA) which is codified at ORS 30.260 to 30.300. The provisions of the OTCA are controlling in all situations, and the express language of the OTCA should be consulted if the faculty member has any questions about OHSU coverage. Coverage is "occurrence" based coverage. The following is a summary of the relevant provisions of the OTCA for OHSU's professional liability coverage of faculty members:

Patient care rendered on the OHSU campus or OHSU clinics

The OTCA provides that faculty members are "covered" [i.e., OHSU's indemnity and defense obligations apply] for all claims arising out of patient care [including inpatient care, outpatient care, and all forms of clinical consultation] provided by faculty members on the OHSU campus or in an OHSU clinic. ORS 30.267.

Off-campus patient care

The OTCA provides that faculty members are "covered" [i.e., that OHSU's indemnity and defense obligations apply] for all claims arising out of patient care provided by faculty members at a location other than the OHSU campus or an OHSU clinic (each an "Off-Campus Location") **only if** the faculty members meet the requirements of the OTCA for such "off-campus" patient care. To meet those requirements, the following conditions must all be met:

1. Before any patient care is provided at the Off-Campus Location, the faculty member must have express written authorization from the OHSU President or a Representative of the OHSU President ("Representative") to provide patient care at that Off-Campus Location;
2. The patient care must be within the scope of the express written authorization; and
3. Either OHSU must derive fee revenue in the same or a similar amount or percentage as it would for care rendered on the OHSU campus, or the off-campus patient care service must be provided by the faculty member as a salaried or a non-fee-generating volunteer public community or non-fee-generating educational service. ORS 30.268.

This NOA constitutes express authorization from a Representative for the faculty member named herein to provide services constituting patient care at Off-Campus Locations, provided that the faculty member obtains prior written approval from the Director of the OHSU Department of Risk Management or her/his designee ("RM Approval") to provide such services, which RM approval identifies the Off-Campus Location and the scope of the authorization. Patient care services provided at any Off-Campus Location without an RM Approval or outside the scope of an RM Approval are not entitled to OHSU indemnity or defense.

As stated above, the language of the OTCA itself controls in all cases and supersedes the language of this NOA in the event of conflict. The OTCA should be referred to in the event of questions. Questions may also be directed to the office of the OHSU Director of Risk Management, or the OHSU Legal Department.



SCHOOL OF MEDICINE PROMOTION AND TENURE POLICY

Policy # 06-14-017	Title: Promotion and Tenure Policy	
Effective Date: July 1, 2016	Category: Promotion and Tenure	
Origination Date: July 1, 2016	Next Review Date: As needed	Pages 1 of 2

PURPOSE:

The mission of the School of Medicine (SoM) is to enhance human health by providing programs of excellence in education, research, health care and other service. The chief instrument for executing this responsibility is the Faculty of the SoM. Their success depends, in a significant way, on a system that provides recognition and rewards for work done in promoting the mission of the school.

PERSONS AFFECTED:

The faculty of the SoM at OHSU participates in three major activities- teaching, scholarship, and service, which includes patient care and other service to the institution, the profession and the public-these activities have been selected as the basis for recommendations of appointment at, or promotion to, a given rank. In evaluating an individual's performance in these areas of activity, the appropriate constituencies of the SoM must attempt to apply these criteria in such a way as to take into consideration the different expectations that apply at each of the various levels of faculty rank. There are higher and more stringent expectations of associate professors and professors than are the case for assistant professors. The faculty must, through its representatives on the SoM Promotion and Tenure Committee, maintain high standards so that only qualified individuals are promoted to the senior ranks of associate professor and professor.

POLICY:

- A. The Chair of a department has the primary responsibility for initiating and supporting the nomination for appointment, promotion, and tenure status of faculty in his or her department to the Dean of the SoM. The Chair is responsible for assembling and submitting the records necessary for appointment, promotion, and tenure review.
- B. The Promotion and Tenure Committee of the SoM has the responsibility of reviewing and advising the Dean of the SoM on the appointment and promotion to the rank Associate Professor and Professor, and on indefinite tenure nominations made by Departmental Chairs. This committee is charged by the Dean. Its members are appointed by the Dean from nominations made by the Committee on Committees of the SoM.
- C. Departments, depending on size, may have departmental promotion and tenure committees to advise the Chair on nominations for appointment, promotion, and indefinite tenure. The departmental promotion and tenure committee should be organized and function in accordance with SoM policies and procedures as a standard. Each departmental committee will advise the chair on each candidate's qualification for promotion and/or tenure. The initiation of evaluation for tenure shall come from the faculty or the Chair. Each faculty member shall have an annual review of his or her academic performance and productivity. If promotion is appropriate for the faculty member, then that should be communicated to the departmental promotion and tenure committee.
- D. The faculty person being considered for promotion or indefinite tenure has the responsibility for presenting his

or her record of accomplishments in the best possible light, and the right to verify the accuracy and completeness of material used for the review of his or her promotion and change of tenure status.

- E. Completed promotion and tenure packets must be submitted by midnight on the second Monday in January. The request for an extension of the deadline should be submitted by the Department Chair to the SoM Promotion and Tenure Committee Chair prior to December 15th.
- F. For those that do not hold a doctoral degree, the candidate must demonstrate satisfactory accomplishments in either teaching or scholarship. Requests should include a current curriculum vitae, an exception request memo from the Department Chair, along with the faculty member's personal statement. These requests are reviewed and approved by the SoM Promotion and Tenure Committee Chair and the Provost.

PROCEDURES:

SoM Promotion and Tenure

RELEVANT REFERENCES:

SoM Promotion and Tenure Faculty Series Matrix

RELATED DOCUMENTS/EXTERNAL LINKS:

SoM Promotion and Tenure

Policy No. 03-20-001 OHSU Promotion and Tenure – Eligibility for Tenure

Policy No. 03-20-005 OHSU Initial Appointment and Probationary Service for Faculty on Tenure-Track Appointments

Policy No. 03-20-010 OHSU Promotion and Tenure – Timely Notice for Tenure-Track Faculty

Policy No. 03-20-015 OHSU Promotion and Tenure – Post-Tenure Review

Policy No. 03-20-020 OHSU Promotion and Tenure Committee

DEFINITIONS:

Clinical Care and Service – The SoM Promotion and Tenure Committee incorporates accomplishments in clinical care within the category of service. Accomplishments in clinical care alone, however, are generally not considered to be sufficient for promotion to senior faculty levels.

TITLE. POLICY OWNER:

SoM, Office of the Dean, Faculty Affairs and Administration

APPROVING COMMITTEE(S):

SoM, Promotion and Tenure Committee

SoM, Promotion and Tenure Ad Hoc Committee

SoM, Faculty Council

FINAL APPROVAL:

Dean, SoM

**SCHOOL OF MEDICINE
PROCEDURES AND GENERAL GUIDELINES
FOR PROMOTION AND TENURE**

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For question, contact School of Medicine Faculty Affairs and Administration at somfacultyaff@ohsu.edu.

I. PREAMBLE

The mission of the School of Medicine (SoM) is the enhancement of human health through programs of excellence in education, research, health care and other service. The chief instrument for executing this responsibility is the Faculty of the SoM. Their success depends in a significant way on a system that provides adequate recognition and rewards for work done in promoting the missions of the school.

II. PROCEDURES AND PROCESSES

- A. The Departmental Chair shall assemble a dossier consisting of, but not necessarily limited to, the items listed below for each nomination for promotion or change in tenure status. This information will be used in evaluating the candidate's qualification by the Chair, the departmental faculty advising the Chair, the SoM Promotion and Tenure Committee, and the Dean of the SoM.
1. Curriculum vitae (provided by candidate). An up-to-date curriculum vitae, provided by the faculty member, which includes all of the categories of information relevant to the Promotion and Tenure decisions. Candidates should document accomplishments in teaching using the Educator's Portfolio and can include these pages as part of their curriculum vitae or just refer the reader to the separate Portfolio document.
 2. Personal statement (provided by candidate). A written statement of personal contributions and development in the current academic rank prepared by the faculty member defining the rationale for either promotion and/or change in tenure rank.
 3. A job description (provided by department or human resources contact).
 4. Statement of distribution of time and effort (provided by candidate).
 5. Copies of the candidate's annual reviews from the prior 4 years (provided by department).
 6. Documentation of teaching activity and effectiveness including:
 - a. SoM Educator's Portfolio (provided by candidate).
 - b. Evaluations of teaching performance by trainees, peers, and supervisors (provided by department).
 7. Letters of Evaluation
 - a. *Chair's letter*. The Chair should supply a letter of evaluation for each candidate which at least should summarize the candidate's qualifications for the appointment, promotion, or change in tenure status for which the individual is being nominated. The letter should include the Chair's ratings of the candidate's level of achievement in Scholarship, Teaching, and Service, using the categories *satisfactory*, *substantial* and *outstanding*, as outlined under Section V. B.

- b. *Departmental Promotion and Tenure Committee's letter.* Evaluation and advice from the departmental promotion and tenure committee to the Chair on each nomination for appointment, promotion, or change in tenure status should be provided regardless of the nature of the advice. The letter should include the committee's ratings of the candidate's level of achievement in Scholarship, Teaching, and Service, using the categories *satisfactory*, *substantial*, and *outstanding*, as outlined under Section V.B.
 - c. *Other letters of evaluation.* The Chair or Departmental Promotion and Tenure Committee shall solicit sufficient letters of recommendation to receive at least five (for promotion to Associate Professor) or seven (for promotion to Professor or Award of indefinite tenure), as outlined below. In addition to evaluation for excellence in scholarship, service, and teaching, the request shall ask reviewers to evaluate the candidate with regard to whether the candidate would meet criteria for promotion or indefinite tenure at the reviewer's institution.
 - 1) Associate Professor requires five letters of evaluation, at least three of which should be from individuals not associated with the Oregon Health & Science University. It is highly desirable to include letters from individuals at other institutions who are unbiased, i.e. have not been a past colleague, collaborator, or mentor.
 - 2) Professor and/or Indefinite Tenure requires seven letters of recommendation, at least five of which shall come from reviewers not associated with the Oregon Health & Science University. At least two of the outside letters *must* come from unbiased referees who have not been a past colleague, collaborator or mentor. Ideally, all five external reviewers should be unbiased for the strongest effect.
 - d. *Joint Faculty Appointment.* In addition to letters identified above for the rank under consideration, letters from the Chairs of all the departments in which the candidate has academic appointments may be supplied which state whether or not the nomination for promotion or change in tenure applies to their department.
- B. The Promotion and Tenure Committee of the SoM will obtain the dossier for each candidate nominated for appointment, promotion, or indefinite tenure from the Dean's Office. The details of promotion and of tenure are privileged information in every instance, restricted to those directly involved, but are also subject to the Freedom of Information Act. The dossier, along with any other information and communications, which the committee has had with the Dean and/or the candidate's departmental Chair, will be used to evaluate whether or not the candidate's qualifications meet the criteria for the change in status which is being proposed. The advice of the Promotion and Tenure Committee for action in each candidate will be transmitted in writing to the Dean of the SoM.
- C. When the nomination for appointment, promotion, or indefinite tenure is judged not to meet the necessary criteria for change in status, the departmental Chair will be given the opportunity to meet (or have a designee meet) with the committee to rebut the committee's initial findings. Attempt is made to hold the rebuttal as soon as possible following a negative initial committee review. The Chair's rebuttal before the committee is focused on bringing forward new information that may not have been apparent to the committee or did not have

the appropriate emphasis in the candidate's package. Following the Chair (or designee) rebuttal, the committee will re-vote on the candidate. If the candidate nomination remains unsuccessful, the departmental Chair can then appeal directly to the Dean for promotion or award of tenure.

Appeal to the dean is based on institutional considerations that fall outside the purview of factors considered by the committee. The committee chair will advise the Dean on the factors that led to an unsuccessful bid and rebuttal on behalf of the candidate. Advice and counsel should be provided to the Chair by the Dean and to the candidate by his or her Chair when the nomination for appointment, promotion, or indefinite tenure is judged not to meet the necessary criteria for change in status.

In cases where suggestions for promotion or award of tenure of a regularly reviewed candidate are declined by the departmental committee, the Chair of that department, or the SoM's Promotion and Tenure Committee, the candidate can appeal to:

1. The Chair of the department, in cases where the nomination for promotion or award of tenure was declined by the departmental promotion and tenure committee.
 2. The Dean, in cases where the Chair of the department declined to support the nomination for promotion or award of tenure.
- D. The Dean has the prerogative of recommending and the President or Provost has the authority of awarding or not awarding promotion and indefinite tenure in conformity with or contrary to the advice of the SoM Promotion and Tenure Committee. In general, the Dean will notify the Committee of decisions contrary to its advice and will state the reasons for the decision.
- E. *Faculty with Current Provisional Status.* Faculty with provisional status are required to be reviewed during the next annual SoM Promotion and Tenure cycle following their hire date. Appointment reviews require less documentation, and are prioritized by the SoM Promotion and Tenure Committee. If approved, their requested rank will be retroactively effective January 1st.

The following documentation is required for an appointment review:

1. Curriculum vitae in OHSU format (provided by candidate).
2. A brief personal statement, no more than three pages, providing an overview of the candidate's achievements in scholarship, teaching and service that led to his or her current rank (provided by candidate).
3. Letter of support from the department chair.
4. Letter of support from the departmental promotion and tenure committee.
5. Three letters of support from outside sources preferably not the former institution or OHSU.

- F. *Non-Doctoral Exception Requests.* In order to grant an exception for a non-doctoral faculty member to move from the instructional series to the professorial series (Appendix A) documentation of satisfactory teaching (or scholarship) is required. Faculty should collect and share evaluations of all their teaching sessions. This documentation may also include their teaching spectrum, quantified hours, and how they leverage their teaching with others.

Requests for exceptions can be submitted at any time, but it is recommended to submit requests following a faculty member's annual review. Email the following documents to somfacultyaff@ohsu.edu:

1. Educator's Portfolio (provided by candidate).
 - a) Include evidence of quantity of teaching which demonstrates satisfactory teaching at or above the level of peers. Include approximate duration of teaching sessions and number of learners.
 - b) Include evidence of quality of teaching which demonstrates a satisfactory level of teaching. This can be documented by using a summary of teaching evaluation ratings, a summary of comments from learners, conference presentation evaluations, and/or letters of attestation from successful mentoring relationships.
2. Curriculum vitae in OHSU format (provided by candidate).
3. Nomination letter from department chair.

III. PROMOTION AND TENURE PROCESS TIMELINE

A. SoM Promotion and Tenure Timeline

Promotion & Tenure System Login <http://www.ohsu.edu/som/pandt/>

FEBRUARY (*P&T season preparation*)

Department

- Begin working with faculty to schedule meetings with their chair to go through the appointment, promotion, and/or tenure review in the coming year.

Faculty Candidate

- Faculty candidate should consider scheduling a time in the next few months with their chair to discuss promotion and tenure for the coming year.

MARCH (*P&T season in progress*)

School of Medicine

- Review of the faculty members with provisional status are scheduled early. Approved appointment letters will be emailed to the department chairs and department administrators. Approved appointments will be retroactively effective to January 1st.
- SoM Faculty Affairs will work with Compensation and HR Records to update the faculty employee's record and their SoM faculty record. No action will be needed by the department to complete these changes.

Department

- The department distributes the appointment letters to the faculty.

JUNE (*P&T season preparation*)

School of Medicine

- School of Medicine Faculty Affairs will contact department administrators to confirm current department promotion and tenure chair and department promotion and tenure coordinator.
- Promotion and tenure coordinators will be invited to a drop-in session to review how to complete and submit a dossier in the SoM Promotion and Tenure System. All NEW users will be required to attend in order to obtain access to the SoM Promotion and Tenure System.
- If roles and/or staff change through the year, send an email to somfacultyaff@ohsu.edu.

Department

- Update department information

JULY (P&T season preparation)School of Medicine

- The SoM Promotion and Tenure System will open to all users.

Department

- Verify that all faculty who are going to be going through promotion and tenure are listed in the SoM Promotion and Tenure System. If a faculty member isn't listed, email somfacultyaff@ohsu.edu.
- Verify that all faculty hired into provisional status are being submitted for appointment review. If a faculty member isn't listed, email somfacultyaff@ohsu.edu.

Faculty Candidate

- Candidate to prepare their dossiers, and submit all documents to department promotion and tenure coordinator. Check with department promotion and tenure coordinator for department deadline(s).

JULY (P&T season in progress)School of Medicine

- Approved promotion and tenure letters will be emailed to the department chairs and department administrators. Approved promotion and tenure will be effective July 1st.
- The SoM Faculty Affairs will update the faculty employee's record and their SoM faculty record. No action will be needed by the department to complete these changes.

Department

- The department to distribute the appointment letters to the faculty. The department can submit promotional salary increases, effective July 1st. These should be submitted through HRE (contact your HR preparer).

AUGUST – NOVEMBER (P&T season preparation)School of Medicine

- School of Medicine Faculty Affairs will send an email to department administrators that will include reminders and instructions for approaching deadlines.

Department

- Department promotion and tenure coordinator collect and upload all of the faculty candidate's documents to the SoM Promotion and Tenure System. The deadline to submit all candidate documents to the SoM Promotion and Tenure System is December 1st.
- Department promotion and tenure committee reviews faculty candidates.

DECEMBER (P&T season preparation)School of Medicine

- School of Medicine Faculty Affairs will complete an administrative review of each dossier. The department promotion and tenure coordinator will be contacted with any questions, issues, or concerns.

All corrections and updates are to be completed by the department and must be done by the submission deadline, midnight of the 2nd Monday in January.

JANUARY (P&T season preparation)

- Deadline for all promotion and tenure candidate submissions is midnight of the 2nd Monday of the month.

IV. PROFESSORIAL SERIES

A. Assistant Professor

Appointment or promotion to assistant professor is recommended by a department chair for those with a doctoral degree. For those that do not hold a doctoral degree, the candidate must demonstrate satisfactory accomplishments in either teaching or scholarship.

B. Associate Professor

This rank is a senior faculty rank requiring evidence of *substantial* accomplishments. Those aspire to this rank must have achieved four points according to the established point system (See Appendix A).

C. Professor

The rank of Professor is the highest academic rank. It is reserved for appointment or promotion of persons who show clear evidence of a high level of professional accomplishment. Those who aspire to this rank must have outstanding accomplishments in one area and achieve six points (See Appendix A). Faculty members at or appointed to this rank should have achieved national or international recognition.

V. GUIDELINES FOR PROMOTION TO ACADEMIC RANKS

A. General Considerations

In order for a faculty member to be promoted, his/her creativity and productivity must be established. Quality, quantity, and continuity of work consistent with the allocation of percent effort will be taken into consideration for the three main categories of academic achievement: scholarship, teaching, and service.

The categories considered can vary in the different series (described in section IV). Regardless of distribution of effort, contributions to all three of these categories are required for promotion to the senior ranks of Associate Professor and Professor in the non-pre-fixed series. The candidate's accomplishments in each relevant area will be determined to be *satisfactory*, *substantial*, or *outstanding*, as outlined below.

In general, candidates for the rank of associate professor or professor will have been in rank for at least five years.

B. Definitions of Scholarship, Teaching, and Service

1. Scholarship

The definition of scholarly activity requires that the candidate's work involves systematic study in order to advance a field, with public dissemination of the work for critical review. Basic, translational, clinical, and systems-level research activities are valued, as are scholarly activities related to clinical activity and teaching.

Candidates must have contributed to original publications in peer-reviewed journals of high quality and/or produced other original work of a theoretical or applied nature. Inventions, technological advances, or clinical innovations are examples of less traditional evidence of productivity that can be used for promotion. Thus there is value in original translational research leading to commercialization of products that in turn can positively affect health. Scholarly activities related to clinical practice and to teaching will include systematic study of these areas, with public sharing and review of this work through presentations, publications, or dissemination through peer-reviewed curriculum repositories or publishes clinical guidelines.

Team-based investigation is also recognized by the OHSU SoM, and collaborative research is valued in assessments of scholarship, including interdisciplinary and collaborative research as evidenced by co-authorship of scientific publications, patents and licenses for inventions, and serving as co-investigator on grants. However, for those individuals engaged primarily or exclusively in collaborative research, it is imperative that the individual's contribution to collaborative efforts be clearly outlined in the dossier, with documentation of innovation and leadership in his or her own area.

2. Teaching

Teaching activity includes the categories that emerge as the common formats in presenting educational contributions. Categories in the SoM Educator's Portfolio are: 1) Direct Teaching, 2) Curriculum Development, 3) Mentoring and Advising, 4) Educational Leadership and Administration, and 5) Learner Assessment.

Across all five categories, candidates are expected to document the quantity and quality of their accomplishments, using comparative measures when available. Engagement with the education community, as demonstrated by a scholarly approach to education activity, is among the list of common indicators for promotion to the higher ranks in the area of teaching.

3. Service

Service includes professional and administrative activity within the institution, to the candidate's profession, and to the public. Service on medical school or university committees, on committees of scientific societies, to granting agencies and scholarly journals, public relations activities on behalf of the University, and other administrative assignments can be used to demonstrate commitments to service. Professional service to the community at local, state, regional, national or international levels shall also be recognized.

The definition of service for determining promotion and tenure also includes excellence in clinical activities and development and responsibility for shared scientific resources.

C. Guidelines for *Satisfactory*, *Substantial*, and *Outstanding* Achievement in Scholarship, Teaching, and Service

The Promotion and Tenure Committee carefully considers the entire portfolio of each candidate to determine his or her level of achievement in all mission areas. See Appendix B for a general guide to the types of activities that will be considered for promotion purposes and is not an all-inclusive list.

VI. POINTS SYSTEM

Promotion within the SoM is recommended on the basis of a point system, which incorporates and evaluates the accomplishments of the individual as satisfactory, substantial or outstanding. See Appendix A.

VII. CRITERIA FOR INDEFINITE TENURE

- A. Administrative rules mandate that consideration of Indefinite Tenure be made no later than the ninth consecutive year on a full-time Tenure-Track appointment. Individuals who have had part-time tenure-track appointments of less than 1.0 FTE but at least 0.5 FTE also must be considered for indefinite tenure before their accumulated FTE exceeds nine years. Candidates will be notified that they are being considered for promotion and/or indefinite tenure and asked to submit the appropriate curriculum vitae and to suggest appropriate reference sources. Letters of evaluation should be requested as soon as candidates are identified.
- B. Some faculty require a longer "start-up" time due to insufficient initial funding, a hiatus in funding or a need for time off. Examples of the latter could include a leave of absence for child care, illness, or pregnancy. The intent of this policy is to provide fair treatment to high quality people who have valid reasons for delays in career development. The intent is not to force departments to retain, and eventually promote, faculty who are not judged as satisfactory for appointment to Indefinite Tenure.
- C. Indefinite Tenure can only be granted to an individual for whom permanent funding is available to cover the total amount of the tenured salary stated on the notice of appointment.
- D. Beginning July 1, 1997, all new tenured faculty not covered by previous agreements will have a fixed dollar tenure guarantee determined by the Dean after Faculty Council review. Adjustments may be made by the Dean every three years.

1. Indefinite Tenure - Basic Science Faculty

The recommendation for award of Indefinite Tenure for basic science faculty requires documented record of continuous productivity, achieving a level of outstanding accomplishments in scholarly activity, *substantial* in teaching, and at least *satisfactory* in service, or for an occasional individual, *outstanding* accomplishments in teaching, *substantial* in scholarly activity, and at least *satisfactory* in service. Requiring candidates to

achieve an *outstanding* level of performance in scholarly activities is essential to establish and maintain an outstanding basic science faculty.

2. Indefinite Tenure - Clinical Science Faculty

The recommendation for award of Indefinite Tenure for clinical faculty requires a documented record of continuous productivity, achieving a level of *outstanding* accomplishment in one of the 3 categories (scholarly activity, teaching and/or service), *substantial* in another and at least *satisfactory* in the third.

VIII. FAILURE TO ACHIEVE THE AWARD OF INDEFINITE TENURE

- A. If indefinite tenure is not awarded, faculty members may be continued on a fixed-term basis. This does not preclude further consideration of indefinite tenure in the future.

APPENDIX A – Primary Faculty Series

Series	PROFESSORIAL		RESEARCH
Pay Source	OHSU/VA/Shriners		OHSU/VA/Shriners
Track	Standard*	Non-Doctoral (e.g. APP's & NP)	
Title	Assistant Professor		Research Assistant Professor
	⇓	⇓	⇓
	Associate Professor		Research Associate Professor
Assistant Professor	Professor		Research Professor
	⇓	⇓	⇓
	QUALIFICATIONS		QUALIFICATIONS
Assistant Professor	Based on job description	Satisfactory Scholarship or Teaching + Approval	Based on job description
Associate Professor (scholarship, teaching, service)	4 points		Substantial Scholarship
Example	1 Substantial and 2 Satisfactory OR 2 Substantial OR rarely 1 Outstanding and 1 Satisfactory		
Professor (scholarship, teaching, service)	6 points (requires Outstanding in at least one area)		Outstanding Scholarship
Example	1 Outstanding, 1 Substantial, and 1 Satisfactory OR 2 Outstanding		
Tenure Eligible	Yes	No	No
	<i>The standard track includes pathways for individuals who are focused primarily on scholarship, service, or education.</i>		

LEVEL	POINTS ACHIEVED
Outstanding	3
Substantial	2
Satisfactory	1

RANK	POINTS REQUIRED
Professor	6
Associate Professor	4
Research Professor	3
Research Associate Professor	2

	ASSOCIATE PROFESSOR					RESEARCH ASSOCIATE PROFESSOR
Emphasis	Traditional Research	Traditional Clinical	Traditional Educational	Educator	Investigator*, #	
Scholarship	2	1	1		2	2
Teaching	1	1	2	2		
Service	1	2	1	2	2	
Total	4	4	4	4	4	2
	PROFESSOR					RESEARCH PROFESSOR
Emphasis	Traditional Research	Traditional Clinical	Traditional Educational	Educator	Investigator*, #	
Scholarship	3	1	1		3	3
Teaching	2	2	3	3		
Service	1	3	2	3	3	
Total	6	6	6	6	6	3

*: alternatively, the second category could be teaching

#: note also that this track is distinct from the Research Series, which remains intact

APPENDIX B – Reference Guidelines for Promotion & Tenure

This guide provides examples of opportunities, which may allow faculty to meet criteria for each level of achievement. This guide is intended to be used for career planning; it is not intended to be used as a checklist.

	Satisfactory	Substantial	Outstanding
REQUIRED	<p><u>A Local Level:</u> reputation with contribution outside of immediate professional work environment</p> <p><u>Active participation:</u> quality & quantity</p>	<p><u>A Regional Level:</u> reputation/ expertise/ dissemination</p> <p><u>Leadership</u> with evidence of impact or outcomes</p>	<p><u>A National Level:</u> reputation/ leadership/ impact/outcomes/dissemination</p> <p>Maintain contributions with the department and institution</p>
Scholarship Research Excellence	<p><u>Individual Scholarship:</u></p> <ul style="list-style-type: none"> • Publish peer-reviewed high-quality publications (required) • Create inventions, methodology advances • Acquire individual local or institutional funding • Mentor career development award (K, CDA, etc.) • Serve as a journal reviewer • Participate in ad hoc grant review work • Present local or state peer presentations • Disseminate curriculum through peer reviewed abstracts and curriculum repositories • Participate in creation of clinical guidelines or clinical evidence reviews <p><u>Team Science:</u></p> <ul style="list-style-type: none"> • Publish peer-reviewed team science-based publications • Obtain collaborative local or institutional funding <p><u>Innovation:</u></p> <ul style="list-style-type: none"> • Participate in methodology advances, inventions • File invention disclosure, patent application 	<p><u>Individual Scholarship:</u></p> <ul style="list-style-type: none"> • Publish in peer-reviewed journals of high quality with substantial role • Develop and disseminate innovative learner assessment tools • Achieve independent funding • Be invited to present regionally • Lead departmental research program • Serve as an editorial board member • Serve on national grant study sections (NIH, NSF, VA, etc.) • Publish peer-reviewed publications of educational materials in journals or repositories • Lead the creation/dissemination of clinical guidelines or evidence reviews with evidence of being implemented regionally <p><u>Team Science:</u></p> <ul style="list-style-type: none"> • Demonstrate a specific scholarly niche/contribution that is distinct from that of their mentor/team • Demonstrate substantial roles in publishing team science in peer-reviewed journals of high quality • Obtain funding for collaborative efforts <p><u>Innovation:</u></p> <ul style="list-style-type: none"> • Develop new methods or tools that add to research capacity in one or more fields • Acquire a patent 	<p><u>Individual Scholarship:</u></p> <ul style="list-style-type: none"> • Be recognized for scholarship at the national or international level • Maintain sustained extramural funding in independent or collaborative grants • Demonstrate sustained contributions to national professional society committees • Lead innovation in national collaborative research • Lead development of novel educational materials disseminated nationally and implemented at other institutions • Serve in leadership roles in national scientific committees, organizations • Maintain contributions with the department and institution • Be invited to present at national or international presentations • Achieve national recognition/awards from professional or public groups • Serve a critical role in the creation dissemination of national clinical guidelines or evidence reviews <p><u>Team Science:</u></p> <ul style="list-style-type: none"> • Lead extramural funding of collaborative grants • Lead publishing of team science in peer-reviewed journals of high quality <p><u>Innovation:</u></p> <ul style="list-style-type: none"> • Demonstrate translation of invention into practice • Develop industry partnerships, license patents

	Satisfactory	Substantial	Outstanding
REQUIRED	<u>A Local Level:</u> reputation with contribution outside of immediate professional work environment <u>Active participation:</u> quality & quantity	<u>A Regional Level:</u> reputation/ expertise/ dissemination <u>Leadership</u> with evidence of impact or outcomes	<u>A National Level:</u> reputation/ leadership/ impact/outcomes/dissemination Maintain contributions with the department and institution
Teaching Educational Excellence	<ul style="list-style-type: none"> • Demonstrate a consistent teaching commitment pattern • Show an increasing pattern of breadth and roles (lectures, labs, small groups, clinic/ward, supervising research) • Teach activities that extend beyond immediate professional work environment • Receive strong evaluations from learners • Participate in educational committees in department/institution • Provide mentoring with evidence of quality and quantity • Participate in creating/improving curriculum shared with groups outside of immediate professional work environment • Participate in improving or developing learner assessment tools in use outside of immediate professional work environment • Participate in local or state presentations, posters, or peer-reviewed abstracts regarding educational work 	<ul style="list-style-type: none"> • Teach at a sustained (years) level which consistently exceeds peers • Obtain departmental teaching awards • Receive consistently excellent learner and peer evaluations • Be invited to teach in other departments • Be invited to present curriculum innovations regionally • Serve a substantial role in innovative curriculum/course design or change with improved outcomes • Participate in a national accreditation of new training program • Provide mentoring which results in significant accomplishments, awards, publications, presentations • Participate in developing effective mentoring activities, lead improving department mentoring • Demonstrate sustained service on institutional education committees with substantial contributions evident • Serve as course director or lead a department education program • Develop, implement and disseminate innovative assessment tools • Disseminate educational products regionally 	<ul style="list-style-type: none"> • Obtain institutional, regional, or national teaching awards • Receive consistently excellent learner, peer, and course evaluations • Disseminate peer-reviewed educational materials in journals or national curriculum repositories • Be invited to present instructional materials or curriculum at national level • Disseminate instructional materials with evidence of implementation at other institutions • Receive invitations to provide curriculum consultation to other institutions • Provide mentoring exceeding most peers in quantity and effectiveness as measured by mentees' accomplishments • Improve mentoring at the institution by being a mentoring consultant to other departments or lead initiatives to improve mentoring • Hold multiple sustained educational leadership roles in the institution • Obtain leadership roles in national educational organizations • Maintain contributions with the department and institution
Service Clinical Excellence	<ul style="list-style-type: none"> • Demonstrate a pattern of service that is consistent and of an increasing pattern of breadth (committees, task forces, varied organizations/groups) • Show a pattern of increasing responsibility in committees • Participate as a member on institutional committees • Participate in educational, scientific, or health-related community organizations • Serve as an ad hoc journal reviewer • Collaborate in multi-center clinical research studies • Demonstrate significant role in contributions to the clinical team • Participate in clinical quality and safety efforts with impact beyond the immediate professional work environment • Receive strong clinical performance evaluations • Participate in the development of innovative, clinical initiatives or shared scientific resources • Participate in clinical guidelines with impact beyond immediate professional work environment • Present at the local or state level regarding clinical or service work 	<ul style="list-style-type: none"> • Serve in leadership roles for departmental committees • Provide institutional committee service sustained over years • Serve in leadership of educational, scientific or healthcare community organization • Lead department clinical, educational, research program • Lead development of a new institutional shared scientific resource • Participate in leadership in regional committees/ health organizations • Serve with national health organizations with increasing levels of responsibility or significant outcomes • Serve consistently in national credentialing work (board exam questions) • Receive regional/local awards for clinical expertise • Receive invitations to present regionally • Lead development of innovative clinical initiatives with evidence of impact/outcomes • Receive institutional funding for innovative or complex clinical initiatives or shared scientific resources • Demonstrate substantial role in practice initiatives with regional impact on quality • Collaborate in initiation of effective, innovative interdisciplinary practice-related activities 	<ul style="list-style-type: none"> • Serve with sustained high-intensity on institutional committees (level significantly greater than peers and/or chair positions) with evidence of outstanding impact/improved outcomes • Lead national leadership activities in educational, scientific or healthcare related community organizations • Provide sustained administrative leadership in the institution with evidence of outstanding impact/improved outcomes • Hold leadership roles in national committees/ organizations • Maintain contributions with the department and institution • Participate in high-intensity national level interdisciplinary health care-related work groups or committees with evidence of outstanding impact/improved outcomes • Receive national recognition/awards for clinical expertise from professional and public groups • Be invited to present nationally or internationally novel synthesis of knowledge or new techniques and/or procedures • Be invited to consult regarding clinical programs at other institutions • Produce innovative clinical programs that are disseminated and serve as models for other institutions • Obtain external funding for practice innovations, new clinical initiatives or innovative or complex shared scientific resources



Faculty Benefits Summary

This document reflects benefits offered to new employees as of July 1, 2019. Benefits for employees hired prior may differ. Refer to O2 for complete details.

BENEFIT TYPE	WHO IS ELIGIBLE	WHEN ELIGIBLE	BENEFIT	PAID BY
Paid Time Off	Regular employees working at least .5 FTE in an eligible position.	Accrual begins at time of employment. Benefit is available for use immediately after accrual.	For full-time positions, 208 hours per year; prorated for part-time. Maximum PTO balance allowed is 256 hours. May annually cash out 40 hours of PTO at 100 percent of earnings. Cash-out at termination is at 50 percent earnings and is limited to 80 hours.	OHSU
Extended Illness Bank	Regular employees working at least .5 FTE in an eligible position.	Accrual begins at time of employment. Benefit is available following use of 40 hours of PTO annually for illness and other qualifying reasons.	For full-time positions, 64 hours per year; prorated for part-time. No maximum balance.	OHSU
Sick Leave	All employees working up to .49 FTE.	Accrual begins at time of employment. Benefit is available for use immediately after accrual.	For any position up to .49 FTE, 1 hour for every 30 hours worked, up to a maximum of 56 hours per year. No maximum balance.	OHSU
Paid Parental Leave	Regular employees working at least .5 FTE in an eligible position.	After completing the greater of one year or 2080 hours of service.	Up to three weeks of leave, paid at 100 percent of eligible earnings, following the birth or adoption of a child. Runs concurrent with leave under FMLA/OFLA.	OHSU
Holidays	All regular employees.	Immediately.	Nine paid holidays per year.	OHSU
Other Leave	Varies.	Varies.	Includes leave provisions for jury duty, military service, OFLA, FMLA, bereavement, and other reasons. Refer to OHSU policies for details.	OHSU/ Employee
Medical, Dental and Vision Insurance	Regular employees working at least .5 FTE in an eligible position.	1 st of the month following date of hire.	Each medical plan includes prescription benefits; choice between three dental plans and two vision plans. Medical plan options include a high-deductible plan with a Health Savings Account.	OHSU/ Employee
Other Insurance	Regular employees working at least .5 FTE in an eligible position.	1st of the month following date of hire.	\$25K of term life insurance provided at no cost to the employee. Other options include spouse life insurance (including dependent life), short and long term disability, accidental death and dismemberment insurance, hospital indemnity and critical illness.	OHSU/ Employee

