

Faculty Research Compensation
Guidance Document for Period Worked January 1, 2026, through December 31, 2026
Last Updated: December 5, 2025

This document is intended to provide guidance for Faculty Research Compensation for faculty employed by Wake Forest University Health Sciences for work occurring between January 1, 2026 and December 31, 2026.

Salary Expectations

- The purpose of this program is to set fair salary recovery expectations for Wake Forest University School of Medicine (WFUSM) faculty in a manner that drives key behaviors and furthers our desired culture of collegiality, accountability, and excellence.
- These salary expectations are applicable to faculty on Tenure- or Non-Tenure Track and are not contingent. Faculty classified as contingent are not eligible to receive the Research Match.
- Faculty meeting these criteria with a research component of their salary will be expected to support 65% of this research effort with extramural (e.g., grants & contracts) funds. The remaining 35% of research salary can be considered the “match.” Within this program, extramural funds can be derived from any extramural research funding source, regardless of F&A rate.

Research Incentive

- The purpose of this program is to provide financial incentive and recognition for successful research-intensive faculty.
- Faculty must meet the following criteria to be eligible for a Research Incentive:
 - Research Intensive (50% or greater research effort)
 - At rank of Assistant Professor, Associate Professor, or Professor
 - On Tenure Track or the Non-Tenure Track (and not Contingent)
 - In an eligible position, rank, and track at WFUSM for the full time period (January 1, 2026 through December 31, 2026).
 - Employed by Wake Forest University Health Sciences at the time of payout (April 2027 payroll).
 - 0.75 total FTE or greater
 - Research Incentive calculation within ranges identified below
- Prior to each fiscal year, faculty will choose whether potential Research Incentives will: 1) be received as a salary bonus payment; 2) be placed in a research and development account; or 3) be split 50/50 between funding a salary bonus payment and supporting a research and development account. Faculty who have not

declared their intent prior to the beginning of the fiscal year will default to option 1 – Research Incentive funding salary bonus payment. No changes to elections will be allowed after the beginning of a fiscal year.

- Research Incentives will be calculated based on percent of annual extramurally funded research effort, capped at 90% support, and the financial incentive will be consistent across rank.
 - Percent of annual extramurally funded research effort is calculated by determining an individual's funded research effort (numerator) and research base (denominator).
 - These calculations are based on actual payroll data and source of funds for the period worked, which in this case is January 1, 2026, to December 31, 2026. This process is separate and distinct from effort certifications.
 - Below, please find the calculations for both funded research effort (numerator) and research base (denominator).
 - Research Base (Denominator): All Extramurally Funded Effort + Over-the-Cap + Match + Faculty Salary Bridge + Three-Year Faculty Research Salary Guarantee Usage + Early-Career Salary Support + Tenured Salary Bridge Extension + Federal Response Program + Faculty Funds (e.g., Start-Up Accounts, Institutionally-Funded Research Pilot Projects and Development Accounts).
 - Please note:
 - Extramurally Funded Effort = Project Type 1XXXXXXXXX or GR-XXXXXXXX, Project 40000830459, Project 40000830365, Project 40000830366, Project 41000000088, Project 40000888882, and Project 41000000109
 - Over-the-Cap = PRG20024
 - Match = PRG20023
 - Faculty Salary Bridge = PRG20027
 - Tenured Salary Bridge Extension = PRG20056
 - Three-Year Faculty Research Salary Guarantee = PRG20030
 - Early-Career Salary Support = PRG20031
 - Faculty Funds (e.g., Start-up and Development Accounts) = all 4XXXXXXXXXX accounts with the exception of Project 40000888883, Project 40000888886, and Project 40000820795.
 - Research intensive faculty (> 0.50 absolute FTE) with effort between 0.75 FTE and 0.99 FTE are eligible for prorated Research Incentives.
- It is recommended that faculty with interest in the Research Incentive process regularly audit effort using the above calculation methodology. If any faculty member has a question about the potential impact of a funding source, please contact Sergio Blanco at Sergio.Blanco@advocatehealth.org. In addition, if you

would like the Dean's Office to provide an audit for activity occurring during this period, please make a request to Sergio Blanco. The audit will be provided to give a faculty member or group of faculty members an understanding of their effort profile in advance of final Research Incentive calculations.

- Departments are not permitted to submit manual cost transfers after the close of a fiscal year in efforts to impact Research Incentive payouts.
- Faculty utilizing any bridge program offered by WFUSM to support themselves or their staff during this period worked will not be eligible to receive a Research Incentive. WFUSM bridge programs include the Federal Response Program, the Faculty Salary Bridge Program, the Three-Year Faculty Research Salary Guarantee Program, the Early-Career Salary Support Program, and the Tenured Salary Bridge Extension Program.
- The following criteria will be used to calculate Research Incentive payments:
 - 70% - 74% = \$550 per % unit
 - 75% - 84% = \$1,100 per % unit
 - 85% - 90% = \$1,650 per % unit
- The following table can be used to calculate Research Incentive payments by percent of annual extramurally funded research effort.

% of Research Effort Extramurally Funded	RI Increment	Total \$ Incentive
70%	\$550	\$550
71%	\$550	\$1,100
72%	\$550	\$1,650
73%	\$550	\$2,200
74%	\$550	\$2,750
75%	\$1,100	\$3,850
76%	\$1,100	\$4,950
77%	\$1,100	\$6,050
78%	\$1,100	\$7,150
79%	\$1,100	\$8,250
80%	\$1,100	\$9,350
81%	\$1,100	\$10,450
82%	\$1,100	\$11,550
83%	\$1,100	\$12,650
84%	\$1,100	\$13,750
85%	\$1,650	\$15,400
86%	\$1,650	\$17,050
87%	\$1,650	\$18,700
88%	\$1,650	\$20,350
89%	\$1,650	\$22,000
90%	\$1,650	\$23,650

Three-Year Faculty Research Salary Guarantee Program

- The purpose of this program is to guarantee the components of salary associated with research of the most consistently successful research-intensive Wake Forest University School of Medicine faculty.
- Faculty must meet the following criteria to be eligible for this program.
 - Research Intensive (50% or greater research effort)
 - At rank of Assistant Professor, Associate Professor, or Professor
 - On Tenure Track or the Non-Tenure Track (and not Contingent)
 - In an eligible position, rank, and track at WFUSM for the full time period reviewed (6 years)
 - 0.75 total FTE or greater for the full time period
 - Nomination by their Department Chair with an attestation that there is no known upcoming funding gap.
 - Meet effort requirements outlined below.
- To be eligible for the Three-Year Faculty Research Salary Guarantee Program, faculty must have 75% or greater annual extramurally funded research effort for six consecutive years at Wake Forest University School of Medicine.

- Percent of annual extramurally funded research effort is calculated by determining an individual's funded research effort (numerator) and research base (denominator). These calculations are based on complete fiscal year funding data.
- Below, please find the calculations for both funded research effort (numerator) and research base (denominator).
- Funded Research Effort (Numerator): All Extramurally Funded Effort + Over-the-Cap Support
- Research Base (Denominator): All Extramurally Funded Effort + Over-the-Cap + Match + Faculty Salary Bridge + Three-Year Faculty Research Salary Guarantee Usage + Early-Career Salary Support + Tenured Salary Bridge Extension + Federal Response Program + Faculty Funds (e.g., Start-Up Accounts, Institutionally Funded Research Pilot Projects and Development Accounts).
- Please note:
 - Extramurally Funded Effort = Project Type 1XXXXXXXXX or GR-XXXXXXXX, Project 40000830459, Project 40000830365, Project 40000830366, Project 41000000088, Project 40000888882, and Project 41000000109
 - Over-the-Cap = PRG20024
 - Match = PRG20023
 - Faculty Salary Bridge = PRG20027
 - Tenured Salary Bridge Extension = PRG20056
 - Three-Year Faculty Research Salary Guarantee = PRG20030
 - Early-Career Salary Support = PRG20031
 - Faculty Funds (e.g., Start-up and Development Accounts) = all 4XXXXXXXXX accounts with the exception of Project 40000888883, Project 40000888886, and Project 40000820795.
- Note 1: The threshold for this program remains at 75% effort to capture the most consistently successful, research-intensive faculty.
- Note 2: Career Development Awards are eligible to count toward the 75% funding expectation up to a maximum of three years. The faculty member must continue to meet the 75% funding expectation for subsequent consecutive years following their Career Development Award to meet the program's six-year requirement. Salary funded through extramural funds preceding the Career Development Award will not be considered for the 6-year goal. The following Career Development Awards are eligible for this program: K01, K02, K05, K07, K08, K22, K23, K24, K25, K26, K76, K99/R00, KL2 or comparable extramural career development awards protecting 75% or more research effort. Note: if not a traditional K mechanism, please connect with the Dean's Office in advance to determine eligibility. Examples of use of this program include:
 - WFUSM faculty member is funded at 75% on a five-year career development award. Following this period, the faculty member would

be required to maintain 75% funding for three consecutive years to be eligible for the program.

- Faculty member transfers to WFUSM with two years remaining on a Career Development Award that funds 75% of their effort. Following this period, the faculty member would be required to meet the 75% funding expectation for four consecutive years.
 - WFUSM faculty member is funded at 75% for one year then receives a five-year Career Development Award that funds 75% of their salary. Following this period, the faculty member would be required to maintain 75% funding for three consecutive years to be eligible for this program.
 - Note 3: Faculty who have utilized some form of Bridge Funding within their 6-year review for the program will remain eligible if they maintain the required 75% funding for each of those six years according to the calculation above.
 - Note 4: These calculations are based on actual payroll data and source of funds for the period worked. This process is separate and distinct from effort certifications.
 - Note 5: The program is designed to support faculty who do not meet the extramural funding expectation for a limited period. It will not support those who intentionally choose to reallocate funding for other purposes.
- Enrolled faculty maintaining this level of extramural funding will be “renewed” each year, restarting their three-year guarantee.
 - Should a faculty member already enrolled in this program drop below the 75% threshold, they will be eligible for renewal the following year if they meet 2 requirements: 1) they raise funding back over the 75% expectation; 2) this drop below the requirement was a one-time occurrence over a three-year period.
 - Enrolled faculty that do not meet the minimum requirement for this program will be “rolled into Year 2” (enter year 2 of the three-year guarantee) and “rolled into Year 3” (enter year 3 of the three-year guarantee) before ultimately being removed from the program.

Early-Career Salary Support Program

- The purpose of this program is to increase support for early-career faculty and provide an extended period for these individuals to reach the 65% salary funding expectation.
- If a faculty member applying to access the Early-Career Salary Support Program has an existing start-up and development account, School of Medicine leadership, in partnership with Department Chairs, will review circumstances and determine what expenses should be covered by those accounts as compared to this program.

- The Wake Forest University School of Medicine salary cap of \$250,000 applies to the Early-Career Salary Support program.
- This program is available to research-intensive (50% or greater research effort), tenure- or non-tenure track early-career faculty who have completed the start-up phase defined in their offer letters. This program does not apply to faculty within their startup phase or contingent faculty. A copy of the faculty member's offer letter is required to confirm their start-up period. Please note that "start-up phase" refers to the measure of time defined within an offer letter. Unless otherwise stated, the start-up period will be 4 years after the hire date.
- To access this program, the Department Chair must submit an application, which can be found [here](#). There will be monthly start dates with applications due 30 days in advance.
- Faculty at the rank of assistant professor for 7 years or less who have not received a Career Development Award are eligible for a reduced extramural funding expectation. They are expected to support 50% of research effort with extramural funds. When completing the start-up period, if the individual is funded at 50% of their research effort with extramural funds, they are eligible to apply for access to these funds. If a faculty member completing their start-up period does not meet the 50% expectation, they should apply for Faculty Salary Bridge Funding.
- Faculty within 2 years after completion of a Career Development Award (e.g. K08, K23, KL2, etc.) are eligible for a reduced extramural funding expectation. There are 2 paths to consider:
 - Faculty members completing Career Development Awards as planned: expected to support 25% of research effort with extramural funds. When a faculty member completes the grant and is funded at 25% of their research effort with extramural funds, they are eligible to apply for access to these Early-Career Salary Support funds. If a faculty member completing their Career Development Award does not meet the 25% expectation, they should apply for Faculty Salary Bridge Funding.
 - Faculty members whose Career Development Awards have been prematurely terminated due to shifts in Federal policy: eligible to apply for Early-Career Salary Support to fund up to 75% of their research effort for a 2-year period following termination of their Career Development Award. Access to these funds will require a careful mentoring and management plan to support these faculty and reduce financial exposure. If significant evidence of progress exists, there is an opportunity to extend this program, at least in part, beyond the 2-year period.

Federal Response Program

- The purpose of this program is to provide funding support to faculty and staff who have been adversely impacted by shifts in federal funding expectations. These funds will allow our faculty the opportunity to submit new grant applications, wait for pending proposals, or provide faculty with the opportunity to pivot and retool research programs. In addition to these funds, via the Clinical and Translational Science Institute, faculty members will be provided with a significant set of resources to support their efforts. Accessing this program requires a cooperative partnership between the investigator, their Department Chair, the Dean's Office, and the CTSI.
- If a faculty member applying to access the Federal Response Program has an existing start-up and development account, School of Medicine leadership, in partnership with Department Chairs, will review circumstances and determine what expenses should be covered by those accounts as compared to this program.
- Faculty must meet the following criteria to be eligible to apply for the Federal Response Program:
 - Research Intensive (50% or greater research effort)
 - At rank of Assistant Professor, Associate Professor, or Professor
 - On Tenure Track or the Non-Tenure Track (and not Contingent)
 - 0.75 total FTE or greater
 - Have documentation that grants have been terminated or delayed due to changes in Federal policies.
 - Approval from their Department Chair to access this program
- There will be monthly start dates with applications due 30 days in advance. You can find the application [here](#).
- WFUSM leadership will review the applications and make a funding decision. As necessary, the Department Chair will attend this meeting to participate in the discussion and decision. Dean Boulware will review all decisions.
- Investigators may apply for a 6-month, intramurally funded grant to fill critical gaps created by terminated or delayed grants. These awards are intended to provide limited funding to support teams while they await delayed grants or seek alternative funding sources. They are not intended to replace extramural funding. Funds can support:
 - Faculty or Staff Effort (bridging faculty/staff will be prioritized)
 - Supplies or Other Costs (funding for these areas will be limited and require significant justification.)
 - Note: No funds will be sent outside of the institution.

- At the conclusion of the 6-month intramural grant, investigators are eligible to apply for one 6-month extension. To receive this extension, the investigator must show documented evidence of sufficient progress to extramural funding that will support continuation of the program. You can find the continuation application [here](#).
- If extramural funding is reinstated or new grants are received to cover shortfalls, it is expected that the investigator will notify their Chair and the Dean's Office immediately. The investigator, the Chair, and WFUSM leadership will meet immediately to stand down this intramural support and effectively transfer effort to extramural sources to the degree possible and appropriate.
- If an investigator fails to secure extramural funding after completion of the intramural grant:
 - Staff positions must: A) shift to alternate funding sources (within or outside of historical team); B) undergo FTE reductions to the amount funded extramurally; or C) be eliminated.
 - Faculty must: A) identify alternative sources of funding; or B) apply for access to the Faculty Salary Bridge Program.

Faculty Salary Bridge Program

- The purpose of this program is to provide salary support to eligible Wake Forest University School of Medicine faculty whose extramurally funded research effort falls below the 65% expectation.
- The Wake Forest University School of Medicine salary cap of \$250,000 applies to the Faculty Salary Bridge program.
- Faculty must exhaust all start-up and development accounts in advance of accessing this program.
- Faculty must meet the following criteria to be eligible to apply for Faculty Salary Bridge Funding:
 - Research Intensive (50% or greater research effort)
 - At rank of Assistant Professor, Associate Professor, or Professor
 - On Tenure Track or the Non-Tenure Track (and not Contingent)
 - Approval from Department Chair to access this program
 - 0.75 FTE or greater
- To access this program, the Department Chair must submit an application, which can be found [here](#). There will be monthly start dates with applications due 30 days in advance.

- WFUSM leadership will review the applications and make funding decisions. As necessary, the department chair will attend this meeting to participate in the discussion and decision. Dean Boulware will review all decisions.
- The Faculty Salary Bridge Program is a gated, 18-month program. This means that Department Chairs may submit initial applications for faculty to receive support for a maximum of 12 months. At the conclusion of the 12-month period, Department Chairs may submit a 6-month extension request (link to application will be provided in advance of final publishing) on behalf of the faculty member if the following conditions are met:
 - Faculty member has been on any faculty bridge program for less than 18 months. As an example, if a faculty member received six months or greater via another mechanism (e.g., 3-Year, Federal Response, Early-Career) followed by 12 months of bridge, they will be ineligible for an extension.
 - Faculty member has demonstrated:
 - Significant effort to receive extramural funding (e.g., submitted applications as PI or Co-I) during the initial bridge period.
 - Significant effort to continue publishing during the initial period of bridge support (e.g., submitted/approved manuscripts).
 - Consistent engagement with CTSI resources available to support faculty in developing research programs and obtaining extramural funding.
- After a faculty member exhausts their eligibility on the Faculty Salary Bridge Program and does not meet the 65% extramural funding expectation:
 - Tenured faculty will transition to the Tenured Salary Bridge Extension Program.
 - Non-tenured faculty (including faculty on the Tenure Track but have not yet achieved tenure) will undergo the steps below at the direction of the Department Chair. Please reference the policy, Performance Management for Research Intensive Faculty within PolicyTech.
 - Department Chairs must meet with each non-tenured faculty member to develop an individualized plan to remediate any performance issues. If a performance issue is related to the funding expectation, faculty may increase funded FTE dedicated to clinical practice, research, teaching, service, and/ or administrative activities, and/or voluntarily reduce total FTE.
 - If measures implemented do not resolve performance concerns, including meeting funding expectations, the non-tenured faculty member may be placed on a Performance Improvement Plan, have their FTE reduced to the funded amount, or the non-tenured faculty member will be provided notice of termination of employment. If termination of employment is being considered, Department Chairs

must first consult with WFUSM leadership and Teammate Relations before providing notice to the faculty member. Faculty must be given 90 days' notice of termination of appointment per the Termination of Appointments policy, which can be found in PolicyTech.

- Note 1: Non-Tenured faculty who do not meet funding expectations and are not approved for the Faculty Salary Bridge Program will undergo the same funding remediation process, led by their Department Chair.
- Note 2: The primary change to the historical Faculty Salary Bridge Program is the establishment of a 12- or 18-month limit on the Faculty Salary Bridge Program. Implementation of these guidelines will require Department Chairs to meet with each faculty member on the Faculty Salary Bridge Program to review guidelines and develop individualized remediation plans. Faculty who have been on the historical Salary Bridge Program for 12 or more months will need to follow these steps (non-tenured and tenured). Chairs will reference the Performance Management for Research Intensive Faculty policy within PolicyTech and partner with WFUSM leadership for these discussions.

Tenured Salary Bridge Extension Program

- The Tenured Salary Bridge Extension Program is for faculty who have obtained tenure and have exhausted eligibility on the Faculty Salary Bridge Program.
- Please reference the Performance Management for Research Intensive Faculty policy within PolicyTech.
- Faculty must exhaust all start-up and development accounts in advance of accessing this program.
- Department Chairs must meet with each faculty member entering this program to develop an individualized plan. Faculty may choose to increase funded FTE dedicated to clinical practice, research, teaching, service, and/ or administrative activities or they may choose to voluntarily reduce their total FTE.
- Department Chairs must place faculty members remaining on the Tenured Salary Bridge Extension Program on a Performance Improvement Plan (PIP). Department Chairs will consult with Teammate Relations when administering a PIP to a faculty member. Teammate Relations will provide a PIP template and help Chairs develop and administer a PIP that is consistent with policies.
- Salaries of faculty on the Tenured Salary Bridge Program will be reduced by 25% annually, to a floor of the 10th percentile for PhD Instructors within the faculty member's specialty based on the most recent Associate of American Medical

Colleges (AAMC) benchmarks utilized by the Wake Forest University School of Medicine. Department Chairs must work with WFUSM leadership to administer salary reductions. Please note, the first salary reduction associated with this program will occur as the tenured faculty member enters this program with subsequent reductions occurring annually.

- When a tenured faculty member demonstrates resolution of all performance deficiencies for a period of 6 months, the individual's salary and circumstances will be reviewed. A panel will be formed to review each case and determine the appropriate salary level based on performance and mutually agreed upon expectations. This panel will include the faculty member's Department Chair, the Vice Dean for Faculty Affairs, the Academic Operations leader, and a representative from Human Resources. All recommendations generated by these panels will be reviewed and approved by the Dean prior to implementation.