



UC San Diego

Policy & Procedure Manual

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PERSONNEL – ACADEMIC - DRAFT-

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ENDOWED CHAIRS AND PROFESSORSHIPS – DRAFT-

PPM 230-191.A Scope and Policy

1. This policy guides the establishment and administration of all endowed chairs and professorships, including distinguished professorships, which are typically established by a gift or allocation. For convenience, all will collectively be referred to as “endowed chairs.” Chair funds are held by either ~~to~~The Regents or ~~to~~the UC San Diego Foundation depending on the terms.
- ~~1-2.~~ For convenience, all will collectively be referred to as “endowed chairs.” Endowed chairs are awarded to honor extraordinary academic achievement and to recruit and retain the most distinguished scholars. An endowed chair is a perquisite that is supported by income payouts from an the endowment fund established by a gift or gifts from private sources and is made available to a distinguished faculty member in support of their teaching, research, and service activities. An endowed chair may be assigned to a department, division, or school.

PPM 230-191.B Establishment of an Endowed Chair

PPM 230-191.B.1 Funding of the Endowed Chair

- a. All contacts and discussions with prospective donors shall be coordinated with UC San Diego Advancement.
- b. The minimum amount of a gift or gifts required to establish an endowed chair shall not be less than \$1,000,000 (amounts in certain academic areas are higher, see [PPM 410-30](#)).
- c. A pledge to establish an endowed chair shall be in such a form as to constitute a legally binding commitment by the donor. ~~Pledges to the~~For Endowed chairs held by the UC San Diego Foundation, ~~shall be supported by a binding agreement by the Foundation to transfer~~ endowment income payout is transferred annually to The Regents ~~to fund the chair~~ in accordance with Administrative Guidelines for Campus Foundations.
- d. Establishment of an endowed chair shall be conditional upon full funding by a specified closing date. The gift agreement shall include a proposed payment schedule specified at the time of Chancellor approval, unless there is a legally binding, irrevocable commitment to complete the funding by bequest or similar deferred gift for which there can be no predetermined termination date. A request to approve the establishment of an endowed chair shall not be made prior to receipt of at least one-fourth of the total sum required to fund the chair endowment.
- e. A proposal to fund all or any portion of a chair endowment through a deferred gift or future bequest will be based on established UC San Diego Advancement policies and protocols, which may include review by the Campus Chief Financial Officer and Campus General Counsel.

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Before a commitment is made to a prospective donor to establish and name an endowed chair, the deferred gift or bequest must have an estimated remainder equal to or in excess of the minimum dollar amount required to fund the chair.

- f. Whenever full funding of the endowment ~~will is be~~ dependent upon receipt of future pledge payments or upon realization of a deferred gift or bequest, the donor should be encouraged to include in the governing gift instrument (a) a provision permitting alternative University uses of ~~income the payout~~ during the period in which ~~the fund is accumulating~~ pledge payments are being made (b) a provision permitting reallocation to alternative University uses if the minimum funding level is not achieved, and (c) a provision for a donor intending to make a bequest to provide annual funding in lieu of payout ~~payout replacement during the donor's lifetime.~~
- g. The gift instrument shall permit the Chancellor of UC San Diego to re-designate the endowed chair and the use of the annual payout to an alternative area of the campus ~~appropriate alternative distribution of the income~~ if the subject area of the endowed chair ~~ceases becomes to be~~ inconsistent with the University's mission or the academic plan of the campus. Such alternative ~~distribution uses~~ shall be as closely related to the donor's original intent as feasible.

PPM 230-191.B.2 Chair Definitions

The two² types of endowed chairs at UC San Diego are:

- a. **Term Endowed Chair.** A chair with a set appointment term (e.g., five years) may be used to honor a distinguished ~~UCSD-UC San Diego~~ faculty member or to attract a distinguished scholar and teacher to the ~~UCSD-UC San Diego~~ faculty. Appointment to a term endowed chair ~~is will be~~ for the term number of years proposed and approved at the time of appointment and/or reappointment. ~~Term endowed chair holders may be eligible for additional terms. of years specified for the chair. Term chairholders may be eligible for additional terms.~~ In general, a reappointment to a term endowed chair ~~will be is~~ considered a new appointment.¹

Academic appointees eligible for a Term Endowed Chair are:

- All Senate Faculty
 - HS Clinical Faculty
 - Adjunct Faculty^{2,2} (excluding Professor of Practice)
- b. **Administrative Chair.** An administrative chair is intended to enhance the attractiveness and academic prestige of an academic administrative position for a distinguished scholar and teacher. Appointment to such an endowed chair is limited to a senior faculty member who is or will be a dean, department chair, director, or holder of an equivalent administrative position and is for the period of the appointee's tenure in the associated administrative position.

PPM 230-191.C Chair Proposal Criteria

1. The Chancellor retains authority for establishing and naming endowed chairs and professorships contingent upon funding of the endowment for the chair.

¹ As of January 2015, Term Endowed Chairs became the standard for an endowed chair at UC San Diego and, no new ~~P~~permanent Endowed Chairs ~~were will be authorized.~~ Permanent Endowed Chairs are those whose appointees are permanent for the duration of their academic tenure at UC San Diego per the terms of the associated gift agreement. Faculty appointed to a permanent Endowed Chair prior to 2015 will retain the Chair until vacated. A permanent Endowed Chair is declared vacant at the time of retirement, termination, or death of the chair-holder. ~~Vacated permanent Endowed Chairs will return to Academic Affairs~~

² Adjunct faculty eligible to receive a Term Endowed Chair appointment must be full time, salaried appointees. Professor of Practice is a UC San Diego working title for Adjunct faculty and are not eligible to receive a Term or Administrative Endowed Chair appointment.

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2. No final commitment to establish and name a chair shall be made to a prospective donor prior to Chancellor approval.
3. A chair may be named in honor of the donor or an honoree proposed by the donor, subject to approval by the Chancellor.
4. Deans and department chairs should work together with the donor, the appropriate vice chancellor and ~~the Office of External Relations~~ UC San Diego Advancement to ensure that the proposed endowed chair ~~meets the~~ has the appropriate criteria ~~listed below for subject to allow for~~, breadth, and flexibility. The chair definition should be broad enough to allow new research directions and to ensure as broad a candidate pool as possible. Completed proposals are reviewed for campus approval as detailed below in section PPM230-191.C.1

PPM 230-191.C.1 Proposal for Creation of an Endowed Chair

A proposal ~~to establish an~~ for the creation of a new endowed chair will be provided by the Dean or Vice Chancellor of the benefiting unit, and should address the following: shall be reviewed and endorsed by the following, in the order specified:

~~• A proposal to establish an endowed chair should address the following:~~

~~a. How~~ is the proposed endowed chair consistent with the mission of the University and ~~the academic plan of the campus~~ campus academic plan?

- If the proposed endowed chair requires that the holder be appointed in a specific area, describe how such a requirement is consistent with the priorities of the department, school, or university.

~~b. Does the proposed endowed chair call for the University to make a commitment to an area that is consistent with the academic plan? For example, if it requires that a department hire the chairholder in a particular area, is this consistent with priorities the department has previously identified?~~

~~e.b. Does~~ Whether the proposal proposed endowed chair requires the campus ~~to~~ commit an new FTE in an area consistent with the needs of the campus. ~~?~~ If required, discuss how such a commitment is consistent with the needs of the proposed unit and whether the FTE will be budgeted and funded for the duration of the endowed chair appointment without regard to the chair's annual payout.

~~If an FTE commitment is required, the appointee's series should be clarified, e.g. only Ladder Rank Senate Faculty will be eligible to hold such an Endowed Chair~~

~~d.c. Does~~ Ensure the proposal proposed for the endowed chair criteria do not make demands that are inappropriate or difficult to adhere to (e.g., too narrow a research focus)?

A proposal for the establishment of a new endowed chair shall be reviewed and endorsed by the following, in the order specified:

- a. Department Chair (if applicable)
- b. Dean
- c. Appropriate Vice chancellor

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d. ~~University Educational Policy Committee (EPC)~~ Applicable UC San Diego Academic Senate Committee

~~e.~~ Executive Vice Chancellor

~~e.f.~~ Chancellor

See detailed procedures at: Endowed Chairs on [Blink](#).

PPM 230-191.C.2 Appointment and Reappointment to a Term Endowed Chair

Approval³ of the establishment of the endowed chair is required prior to an appointment being made.

- Candidates nominated to fill endowed chairs must hold a full-time faculty appointment.
- The Chancellor has the authority to grant exceptions to the appointment of endowed chairs.

a. Department-based Endowed Chairs

If the endowed chair is assigned to a department, the department chair will engage in a consultative process to identify candidate(s) for the endowed chair.

The department chair shall then choose a committee consisting of five members (three from the department and two from outside of the department) to review the qualifications of the candidate(s). The selected candidate's scholarly record must be highly distinguished and meritorious and in harmony with the stated terms, goals and purpose of the endowed chair.

b. Non-Department-based Endowed Chair

If the endowed chair is not assigned to a specific department, the dean and/or applicable Vice Chancellor will engage in a consultative process to identify candidate(s) for the endowed chair. The dean and/or applicable Vice Chancellor shall then choose a committee consisting of five members (~~representing the school~~) to review the qualifications of the candidate(s). The selected candidate's scholarly record must be highly distinguished and meritorious and in harmony with the stated terms, goals, and purpose of the endowed chair.

If the candidate is not currently a UC [San Diego](#) appointee, appointment to the endowed chair shall be made in accordance with established University and campus procedures for faculty appointments (see [PPM 230-220](#)). After a thorough search for a candidate, an academic appointment file will be submitted for academic and administrative review. The file will address the appointment to the endowed chair as well as the candidate's qualifications for academic appointment. Campus reviewers will comment separately on the academic appointment and on the suitability of the candidate to occupy the endowed chair.

³ Regents' Standing Order 100.4 (dd) issued July 11, 2019 delegated general authority to the Chancellor to establish, name and disestablish Endowed Chairs. Chairs established prior to this delegation received approval from the President. Chairs established after July 11, 2019 are approved by the Chancellor.

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PPM 230-191.C.3 Term Endowed Chair Appointment Review and Endorsement

An endowed chair appointment nomination proposal shall be reviewed and endorsed by the following, in the order specified:

- Review committee
- Department Chair (if applicable)
- Dean
- Senate Committee on Academic Personnel (CAP)
- Appropriate Vice Chancellor
- Chancellor

See detailed procedure at: Endowed Chairs on [Blink](#).

PPM 230-191.C.4 Reappointment to a Term Endowed Chair

In general, reappointments to an endowed chair must be reviewed by a departmental review committee. However, a dean may request an exception to this requirement if the chair holder's record of accomplishment in all academic series performance criteria continues to be highly distinguished, meritorious, and in harmony with the stated terms, goals, and purpose of the endowed chair, and if the reappointment is in the best interest of the department, division or school Term Endowed Chair reappointments follow the same review and endorsement as Term Endowed Chair appointments, see previous section PPM 230-191.C.2.

PPM 230-191.C.4 Appointment to an Administrative Chair

- a. Approval⁴ of the establishment of the endowed chair is required prior to an appointment being made.
 - A candidate nominated to fill an endowed chair must hold a full-time faculty appointment.
 - Once the candidate has been approved to hold the administrative appointment with which an endowed chair is associated, the appropriate vice chancellor will designate the candidate for the administrative position as the nominee for the endowed chair and will forward the nomination to the Chancellor via the Academic Personnel Office for appointment.

PPM 230-191.D Use of Endowed Chair ~~Income~~Payout

Guidelines for the allocation of endowed chair payouts are provided in the Appendices I of this policy.

1. Endowment ~~income~~payout made available to holders of endowed chairs shall be used to support

⁴ Regents' Standing Order 100.4 (dd) issued July 11, 2019 delegated general authority to the Chancellor to establish, name and disestablish Endowed Chairs. Chairs established prior to this delegation received approval from the President. Chairs established after July 11, 2019 are approved by the Chancellor.

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the teaching, research, and service activities of the chairholder, in accordance with the gift or allocation terms and University regulations, and according to a budget recommended annually by the chairholder to the department chair and approved by the appropriate vice chancellor, except as noted in Section D.2 below. ~~In consultation with the appropriate academic Vice Chancellor, a portion of the endowment income from the chair may be designated for use in the academic endeavors of the department, school, or college for a prescribed period.~~ The use of endowment payout to support the base salary of the chairholder must be made in accordance with University policy and campus procedures.

2. Endowment income payout made available to the holder of an administrative chair may be used to support the teaching, research, and service activities of the department, research unit, or school in accordance with the gift or allocation terms and University regulations. The administrative chairholder shall determine such use of income payout, according to a budget approved annually by the appropriate dean (unless the chairholder is a dean) or the Executive Vice Chancellor–Academic Affairs.
3. The terms of the endowment shall be reviewed from time to time to ensure that the University is continuing to fulfill its legal obligations to use endowed chair income payout in a manner consistent with the donor's expressed intent.
- ~~3.4.~~ If an established, fully funded chair has remained vacant for a period of ~~three~~ two consecutive years or more, or if a field ~~the~~ chair's accumulated income payout exceeds ~~five~~ two years ~~of payout~~, the campus shall review the fund's terms and administrative history to ascertain the reason for the accumulation and take appropriate corrective action consistent with the terms of the gift instrument or consistent with the terms of the administrative allocation.
- ~~4.5.~~ ~~The Chancellor or applicable Chancellor's designee shall review the terms of the fund at least every five years and~~ Per UC San Diego PPM 410-5, a review of the terms and uses of endowment payout will be performed annual and take the necessary actions will be taken to ensure that the University is fulfilling its legal obligation to utilize chair payouts fully in a manner consistent with the gift instrument. As a guide, accumulated income payout should not ~~be allowed to exceed~~ five ~~two~~ years of ~~times~~ the chair's current annual income payout.

PPM 230-191.E Addition of Income to Principal

1. Standard language in all gift agreements and campus allocations will be included to permit the addition of payout to principal when not needed for the specified use. The Chancellor or the Chancellor's designee is authorized to approve the addition of unexpended payout to the endowed chair fund principal per PPM 410-5.
2. Gift agreements will also provide for redirecting the endowment to alternative University uses if the minimum funding level is not ultimately realized or if the subject area ceases to be consistent with the University's mission and the academic plan of the campus.

~~1. All donors should be encouraged to include in the governing gift agreement provisions permitting:~~

~~a. the addition of payout to principal;~~

~~the alternative University uses of payout during the period prior to full funding of the endowment or when the chair remains vacant for a period of three consecutive years, or in the event accumulated unexpended income exceeds five times the chair's current annual income; and~~

~~b. the reallocation to alternative University uses if the minimum funding level is not~~

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~~ultimately realized or if the subject area ceases to be consistent with the University's mission and the academic plan of the campus.~~

~~2. When written approval from the donor has been obtained, the Chancellor or the Chancellor's designee is authorized to approve the addition of unexpended income to the endowed chair fund principal.~~

PPM 230-191.F Disestablishment of an Endowed Chair

1. Subject to ~~the donor's approval~~ any gift agreement provisions that provide for the resignation of an endowed chair's area and/or alternative uses, the Chancellor, upon recommendation by the Executive Vice Chancellor-Academic Affairs and following consultation with General Counsel, is authorized to disestablish an endowed chair in the event that:

- a. ~~A Receipt of a~~ donor has made request for disestablishment
- b. The subject area ceases to be consistent with the University's mission or the academic plan of the campus; or
- c. The endowed chair remains vacant for a period of three consecutive years and the Chancellor, after consultation with the appropriate vice chancellor, appropriate dean, and the department chair, determines there is no likelihood of filling the chair.

2. Upon disestablishment of an endowed chair, the endowment and any accumulated payout ~~income~~ shall be reallocated to the alternative purpose if stated in the gift instrument or as subsequently specified by the donor in consultation with the Chancellor, or as determined by the Chancellor and permitted by the gift agreement, in consultation with ~~and~~ the General Counsel. If a donor is deceased and has not specified an alternative purpose, the campus shall request the assistance of General Counsel for a review and in obtaining any necessary court approvals for an alternative use of the endowment ~~income payout~~ in a related field.

PPM 230-191.G Reporting

1. The chairholder and unit business offices will be informed annually by the UC San Diego ~~Foundation and UC San Diego~~ Advancement of the projected income payout available for the chairholder's use for the following year.
2. Each chairholder shall submit a brief annual narrative of the past year's activities, a report on the use of the endowment ~~funds payout~~ that supported them, and a budget request for the upcoming year to the department chair for transmittal to the appropriate vice chancellor for approval. The narratives are to be retained by the chairholder, department chair, ~~and appropriate~~ applicable vice chancellor, and UC San Diego Advancement for use in preparing annual reports on endowed chairs to donors or others.

REVISION HISTORY

February 12, 1982	This policy was originally issued.
July 16, 1984	This policy was revised and reissued.
November 1, 2003	This policy was made effective.
April 23, 2018	Minor technical edits to update names and policy hyperlinks.
April 2, 2020	Technical edits to remove gendered language.

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TBD

Current revisions



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Appendix I: ~~January 1, 2015~~ UC San Diego Guidelines for Endowed Chair

These guidelines apply to all endowed chairs and chair appointments established after January 1, 2015. Departments are responsible for ensuring appropriate practices related to these commitments and should expect to report annually to their Dean and the Office of Donor and Fund Stewardship on activities related to these chairs.

Endowed Chairs

A. Gift ~~or Allocation~~ Minimums

General Campus	\$1,000,000
Health Sciences	\$2,000,000
Marin Sciences	\$2,000,000

B. Term

- ~~Per policy (APM 230-8), a chair holder may be appointed for the duration of their term as a member of the UC San Diego faculty or for a specified term. Renewal is subject to a review process. Effective January 1, 2015, all appointments will be made for a specified term of up to five (5) years, unless the university-donor gift agreement dictates otherwise. See PPM 230-191.B.2, Chair Definitions~~

C. Annual Payout (N)

~~Assuming 4.75% payout (60-month average, less .55 in admin) is approximately \$40K/\$80K initially:~~

- Chair Holder Allowance** **\$25,000**

~~The first \$25,000 of annual payout from the fund will provide a \$~~S~~cholarly allowance to be available for expenditure on UC San Diego related uses at the~~ at~~-discretion of chair holder [e.g., GCCP or HSCP/Y component, grad or post-doc support, research support, scholarly travel]~~

- Balance of Payout** **(N - \$25,000)**

~~Any R~~em~~ainder of payout after deduction of the Chair Holder Allowance is to be allocated for use as determined by the appropriate~~ As determined by the appropriate~~-academic Vice Chancellor, this is used~~ for some combination of academic year salary support for the chair holder and support for graduate students in the research area of the chair holder.

Administrative Chairs

A. Gift and Allocation Minimums

Dean/Chairs	\$3,000,000
Vice Chancellors	\$5,000,000

B. Annual Payout (N):

- **Chair Holder Allowance** **\$25,000**
The first \$25,000 may be used a
~~At~~ the discretion of the chair holder
- **Remainder of Payout** **(N - \$25,000)**

Available towards the salary of chairholder. ~~Salary savings revert to the appropriate academic Vice Chancellor.~~

Managing Endowed Chair Payout

Appointments made to endowed chairs prior to January 1, 2015, have a grandfather provision for existing chair holders. In those cases, all payout will be used for the scholarly activities of the chair holder.

- Legacy ~~E~~ndowed chairs will transition to the new ~~January 1, 2015~~-payout rules when the chair holder changes, if consonant with the ~~agreement~~chair establishment documents.
- Existing legacy chair holders may transition to the new rules voluntarily at the time a ~~five-year~~of their next schedule endowed chair review/reappointment.

Commitments to retiring or separating chair holders regarding access to fund balances for a transitional period require prior approval by the Executive Vice Chancellor-Academic Affairs.

- A formal request that includes appropriate justification, amounts, timelines, and impact to filling the chair will be needed.

Decisions to move unspent balances back to principal require the Chancellor's approval per PPM 410-5.

- A request that includes appropriate justification will be needed.

Access to unspent balances on vacant chairs requires approval from the Executive Vice Chancellor-Academic Affairs and will need to be permitted in the existing donor agreement or additional donor permission will need to be sought. and donors.

- A request that includes appropriate justification and the impact to filling the chair will be needed.

Per policy, payout balances are to be expended annually. Payout accumulations beyond two (2) years, such as accumulation for a specific purpose, require an expenditure plan and Dean's approval (PPM 410-5).

UC San Diego Advancement ~~may will periodically~~ request an annual report from chair holders on their use of on endowed ~~fund~~chair payout balances.

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April 2, 2020

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Appendix II: 2015 Chancellor’s Endowed Chair Challenge

In 2015, UC San Diego established the Chancellor’s Endowed Chair Challenge as part of the Campaign for UC San Diego to expand the number of endowed chairs and fellowships available to support the recruitment and retention of quality faculty at both senior and junior levels. Established chairs included a special naming convention for both the donor and match similar to “XXX (donor name) Chancellor’s Endowed Chair in the School of XXX.” This challenge was completed, but may be used at the Chancellor’s discretion. This program provides Chancellor match endowment principal funding of \$500,000 as an FFE in the Regents to augment the minimum donor gift.

A. Minimum Donor Gift Funding Requirements

General Campus	\$1,000,000
Health Sciences	\$2,000,000
Marin Sciences	\$2,000,000

B. Annual Payout (N)

~~a. General Campus & SIO Donor Fund~~

- **Chair Holder Allowance** **\$25,000**

The first \$25,000 payout from the donor fund will provide a scholarly allowance to be available for expenditure for UC San Diego related uses at the discretion of chair holder [e.g., GCCP or HSCP/Y component, grad or post- doc support, research support, scholarly travel]

- **Balance of Payout** **(N-\$25,000)**

As determined by the appropriate academic Vice Chancellor, Any remaining payout after deduction of the Chair Holder Allowance is to be used for some combination of academic year salary support for the chair holder and support for graduate students in the research area of the chair holder.

~~b. Health Sciences Donor Fund~~

- ~~Chair Holder Allowance~~ ~~\$25,000~~

~~The first \$25,000 payout form the donor fund will provide a scholarly allowance to be available for expenditure for UC San Diego related uses at the discretion of chair holder [e.g., HSCP/Y component, grad or post- doc support, research support, scholarly travel]~~

- ~~Balance of Payout (N \$25,000)~~

~~Any remaining payout after deduction of the Chair Holder Allowance is to be used for some combination of academic year salary support for the chair holder and support for graduate students in the research area of the chair holder.~~

- ~~Salary Savings (GC/SIO/HS)~~

- ~~Any salary savings (including those from self-supported programs) would revert to the appropriate academic Vice chancellor. Current expenditure and stewardship policy for endowed chair's apply.~~

- **Matching Chancellor's Fund (Regents FFE)**

Payout from the matching endowment must be used towards payment of any academic year salary of the chair holder (NOT summer salary, General Campus Compensation Plan (GCCP), or the Y component of Health Sciences Compensation Plan (HSCP)). ~~Salary savings created from this resource should revert to the appropriate Vice Chancellor.~~

***Departments are responsible for ensuring appropriate practices related to these commitments and should expect to report annually to the Dean and Office of Donor Stewardship on activities related to these chairs.

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Appendix II: 2014 Presidential Match Endowed Chair Program

The Office of the President established the Presidential Match for Endowed Chairs in 2014 as an incentive to encourage donors to establish endowed faculty chairs. It ~~is~~ was funded through the Presidential Endowment Fund and provides campuses with a \$500,000 Presidential Match once campuses ~~raise~~ raised at least \$500,000 per chair in donor funds, ~~with campuses having the ability to require a larger donor gift if they choose to do so.~~

This program required the creation of two funds:

- Minimum Donor Fund (provided by the donor) \$500,000
- Matching Regents Fund (provided by the President) \$500,000

A. Annual Payout (N):

- **Donor Fund** - As determined by the appropriate academic Vice Chancellor, this is used for some combination of academic year salary support for the chair holder and support for graduate students in the research area of the chairholder.
- **Matching Regents Fund (FFE)**, ~~assuming 4.75% payout (60 month average, less 0.55 in admin) is approximately a 4% payout on the market value as of the end of any given year.~~

- **Chair Holder Allowance \$25,000**

Scholarly allowance at discretion of chair holder [e.g., GCCP or Y component, grad or post-doc support, research support, scholarly travel]

- **Balance of Payout (N-\$25,000)**

Remainder after deduction of the Chair Holder Allowance. As determined by the appropriate academic Vice Chancellor, this is used for some combination of academic year salary support for the chair holder and support for graduate students in the research area of the chair holder.

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