

UCSD ENDOWED CHAIR PROCESSES

Minimums

- The minimum gift to fund an Endowed Chair at UCSD is currently \$1,000,000 for the General Campus, and \$2 million for Health Sciences and SIO.

Titles in that can hold an endowed chair:

- **Ladder rank** – the Professorial series is used for appointees who are members of the faculty of an academic or professional college or school of the University who have instructional, as well as research, University, and public service responsibilities. The series conveys membership in the Academic Senate and accords tenure at the Associate and Full ranks. Generally salary base is from STATE funds (19900).
- **In Residence** – titles in this series are assigned to academically qualified individuals who engage in teaching, research or other creative work, and University and public service to the same extent and at the same level of performance as those holding corresponding titles in the Professor (ladder rank) series. These titles are intended to be used for individuals supported by non-State funds and while the series conveys membership in the Academic Senate, it does not accord tenure or security of employment.
- **Clinical X-** appointees in the Professor of Clinical X series are predominantly responsible for teaching and clinical service, but also engage in scholarly and creative activities. Appointment to a tile in this series will normally carry a heavier teaching load or clinical service than appointees in the regular Professor series or in the Professor in Residence Series. As with the Professor in Residence series, these titles are intended to be used for individuals supported by non-State funds and while the series conveys membership in the Academic Senate, it does not accord tenure or security of employment.
- **Lecturer-Security of Employment (LSoE) and Lecturer-Potential Security of Employment (LPSoE)** – Teaching so specialized in character that it cannot be done with equal effectiveness by regular faculty members or by strictly temporary appointees.

Policy

- UC System wide and campus policies govern the approval and appointment of endowed chairs.
 - The creation of an endowed chair must be approved by the UC Office of the President in order to be established. ***Prior to submitting for approval, the campus must have in hand an irrevocable pledge document for the full amount of the chair from one or more donors, a minimum 25% of the corpus in hand in the form of payments and the campus academic committee approval to create the chair.***

Chair Approval

- The process of Endowed Chair approval in general is:
 - Obtain approval from the Dean/Chair of benefitting Division/Department related to the focus area of the Chair and the salary and benefit cost to be funded by the division/department if a new recruitment.
 - Obtain a gift commitment from a donor(s).
 - Obtain 100% of the funding in irrevocable pledges and gifts. Payments of at least 25% of the chair minimum.
 - The Chair documents (letters and Item for Action) are sent to the Academic Senate (AS) for their endorsement of the chair. The committee typically meets once per month during the academic year. They do not meet in the summer. The endorsement can take 30 days or longer depending on the meeting cycle.
 - Once endorsed by the AS, a letter requesting UC Presidential approval is drafted by Advancement Services for the Chancellor's signature, along with the Item for Action that has

information about the donor and the chair. Approval by the UC President usually takes 3 to 6 weeks, depending mostly on schedules and reviews.

- Once approved by the UC President the Endowed Chair is official and is recognized.
- The benefitting division/department is notified of formal approval as is the donor.
- Advancement Services and Academic Affairs maintain a joint website the chair is added to and can be viewed publically.

Appointments to Chairs

- The process for filling an endowed chair occurs in the academic unit to benefit from the chair
- A chair can be filled prior to full funding of the gift, but many units will wait until it is fully funded, as the endowed payout will be lower otherwise.
- When a chair is to be filled:
 - An academic committee is formed to review the possible chair appointees. If this is a new recruitment for a faculty member, the person will need to meet the academic recruitment requirements. If the chair can be awarded to an existing faculty member for retention or reward purposes, the committee will consider the match to the chair purposes.
 - The committee will make recommendations and the Dean/Chair of the unit will concur. The appointment is reviewed and approved by the Academic Senate Committee on Academic Personnel (CAP/SOM CAP)
 - The EVC Academic Affairs will give final approval and the Chancellor will sign an appointment letter.
 - Appointments are typically for 5 years, and may be renewable.

Endowed Chair Payout Considerations (as of January 2105, new appointment and renewal appts)

- Foundation Funds payout monthly, Regents funds payout one time per year in September
- Chair holder - \$25,000 (scholarly allowance, discretion of chair holder – e.g. GCCP or Y component, grad or post-doc support, research support, scholarly travel)
- Benefitting chair holder as well as Department or Unit – Remainder of payout (N-\$25,000) (e.g. academic year salary support for chair holder or support for graduate students in research area of the chair holder)
- Per policy, payout balances are to be expended annually. Payout accumulations beyond 2 years, such as accumulation for a specific purpose, require an expenditure plan and Dean's approval
- Require an annual narrative for the Endowed Fund Reports to Stewardship and an annual budget projection to the AVC of the SOM.

Chancellor Chair Challenge SPECIAL Considerations

- ONLY LADDER RANK TENURED - professorial series faculty are eligible for these chairs (must have state funded salary)
- The minimum amount required to be raised from a donor to establish an endowed chair is \$2M for Health Sciences. These Chairs would be called the *Donor name Endowed Chair in the Division/School* YYY. Each endowed chair will be funded with a \$500,000 Chancellor's match as an FFE in the Regents to augment the minimum donor investment of \$2M.
- The payout from the Chancellor's contribution (the Regents FFE) must be used towards payment of the state-funded 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)).
- The first \$25,000 from the donor contribution (held by the UC San Diego Foundation) would be the scholarly allowance provided to and used at the discretion of the chair holder (summer salary, GCCP, graduate student support, travel, etc.). The remainder of any payout from the donor contribution would be used at the discretion of the chair holder's department (e.g., for graduate student support for students in the chair holder's area of research or chair holder's academic salary). Any salary savings (including those from self-supporting programs) would revert to the appropriate academic Vice Chancellor.
- Appointments are typically for 5 years, and may be renewable.