Endowed Chairs, Professorships, and Fellowships - UTDPP1118

Rule 60202 Endowment Academic Positions of The University of Texas System's Board of Regents, Rules and Regulations, and The University of Texas at Dallas' policies, UTDBP3034 University Endowment Policy and UTDBP3004 Gifts and Grants from Private Philanthropic Sources govern the effective management of endowed chairs, professorships, and fellowships.

This policy defines the purpose, establishment, oversight, and administration regarding the appointment based on the faculty's exemplary and/or rising scholarship accomplishment to hold the endowed academic position, the length of the appointment and reappointment if appropriate, the allocation of available resources and how these resources would be used, and the periodic review/evaluation of the individual holding the appointment.

Endowed chairs, professorships, and fellowships enrich the academic environment by building high-quality faculty talent through teaching, mentoring, and research or creative activities, and service to the University. These endowed academic positions are also crucial for recruiting and retaining the highest-quality faculty at the University and in turn, attracting the brightest students.

Definitions

Endowed Academic Positions - Endowment agreements will establish the endowed academic positions and outline conditions or restrictions such as specified positions, length of appointment and/or reappointment if appropriate, selection criteria, and fund distribution.

Endowed Chair/Professorship - A faculty position will be supported by an endowment from which distributions are dedicated to reasonable salary support (as determined by institutional policy), salary supplementation, research support, and/or other professional support of a faculty member, subject to the endowment agreement criteria. The holder will normally be a faculty member who has had a distinguished career, and in general, the holder will have been recognized for their distinguished achievements in teaching; research or creative activities; and service to the University, the profession, and the intellectual field nationally and/or internationally. Endowed chairs, including Distinguished University Chair, Distinguished Chair, and Chair, and endowed professorships would be awarded to tenured faculty at the rank of professor. An associate professor or an untenured faculty member may be appointed as Fellow of a Chair or Professorship. Except in extraordinary circumstances, the holder will be named to an Endowed Chair or Professorship for a specified length of time.

Endowed Fellowship - A faculty position will be supported by an endowment from which distributions are dedicated to reasonable salary support (as determined by institutional policy), salary supplementation, research support, and/or other professional support of a faculty member of any academic rank, subject to the endowment agreement criteria. The holder will normally be a faculty member who exhibits demonstrated accomplishment or future promise in the intellectual field. The Endowed Fellowship will be awarded for a specified length of time.
Responsibilities

1. President
   1. Requests prior approval of a Request for Budget Change from The University of Texas System (UT System) Board of Regents.
   2. Makes final recommendation regarding an appointment to an endowed position and forwards the recommendation to The UT System.

2. Chief Academic Officer
   1. Recommends to the President appointment of a faculty member to an endowed position based on the recommendation of and the concurrence of the School Dean.
   2. Consults with appropriate School Dean to develop a plan to fill a vacated endowed position.
   4. Receives copies of Endowment Expenditure Plans from all Schools and transmits them to the Vice President for Development and Alumni Relations.

3. School Dean
   1. Recommends candidates for appointment to endowed positions to the Chief Academic Officer.
   2. Reviews evaluations conducted by the Department Head / Program Head of the Annual Performance Appraisal Report submitted by faculty in endowed positions in relation to their six-year plans.
   3. As part of a Comprehensive Review Process that may include review and recommendation by a committee in the School, the Dean reviews and recommends to the Chief Academic Officer the reappointment of an incumbent in an endowed position.
   4. Reviews and approves the Endowment Expenditure Plan for faculty in endowed positions and forwards it to the Chief Academic Officer.

4. Endowed Chair and Endowed Professor
   1. Completes mandatory university endowment compliance training biannually.
   2. Develops a six-year plan with explicit expectations with short-term and long-term goals and submits it for approval to the School Dean (or the next higher level of approval, as appropriate).
   3. Submits an annual Endowment Expenditure Plan to the School Dean with a copy to the school fiscal officer (or the next higher level of approval, as appropriate).
   4. Submits an Annual Report of activities as part of the Annual Faculty Performance Appraisal process.
   5. In the fall of the last year of the appointment, submits a comprehensive report related to the six-year plan to the School Dean (or the next higher level of approval, as appropriate) for review and recommendation concerning reappointment.
5. **Endowed Faculty Fellow**

1. Completes mandatory university endowment compliance training annually.
2. Develops a one-year plan with explicit expectations regarding what is to be accomplished during that year and submits the plan to the School Dean (or the next higher level of approval, as appropriate).
3. Submits an Annual Report of activities as part of the Annual Faculty Performance Appraisal Process to the School Dean (or the next higher level of approval, as appropriate).
4. In the fall of each year appointed to the fellowship, submits a comprehensive report related to the one-year plan to the School Dean (or the next higher level of approval, as appropriate) for review and recommendation concerning reappointment.

**Selection Process**

To recruit and retain the highest-quality faculty, appointments are recommended to the President by the Provost after consultation/concurrence of the Dean.

Indicators of excellence should be stated for each type of endowed academic position. Specifically, selection criteria shall recognize a distinguished record of excellence for qualified candidates at the rank of professor who demonstrate accomplishments to be appointed to endowed chairs or professorships. Qualified candidates at any academic rank who indicate future promise in the intellectual field may be appointed to fellowships. The selection criteria shall account for a prospective holder’s ability to contribute substantially to the mission and goals of the University, the School, and/or the Department/Program.

The School Dean shall make recommendations of qualified candidates in consultation with the Chief Academic Officer who will review them. Upon agreement and approval, the Chief Academic Officer will forward these recommendations to the President, who will make the final recommendation regarding the appointment to an endowed position and forward the recommendation(s) to The University of Texas System.

**Length of Appointment**

Unless otherwise stated in the endowment agreement, the initial appointment is for a period of six years. The appointments for Endowed Chair and Endowed Professor positions are renewable for six years, and Endowed Fellows are renewable annually. The President, in consultation with the Chief Academic Officer, may choose a different initial length of appointment. Renewal is at the discretion of the President, based on a recommendation of the Chief Academic Officer in consultation with the School Dean who reviews the annual evaluation of the faculty member's teaching, research, and service performance, the School's Faculty Peer Review Committee integral to the periodic performance review process, and the overall needs of the University.
Periodic Review

Periodic review procedures for endowed appointments should be in accordance with the University's policies, UTDPP1064 Procedures Governing Periodic Performance Evaluation of Tenured Faculty, UTDPP1089 Annual Review of Faculty, and UTDPP1047 Evaluation of Academic Administrators.

Allocation and Use of Endowment Distributions / Available Resources

Funds distributed from these endowments will be used to advance the goals and objectives of The University of Texas at Dallas, subject to the conditions or restrictions required by the donor(s) and consistent with guidelines approved by The University of Texas System Board of Regents for the endowment of an academic position (as set forth in Regents' Rule 60202).

Annually, the recipient of the endowment, in cooperation with the School's fiscal officer, shall complete the Report of Endowment Fund Use form. The form must be submitted to the School Dean, who then submits copies to the Office of the Provost and to the Office of Development and Alumni Relations. In addition, the recipient of the endowment is expected to write annual letters of appreciation for the funds to the donor or their designee or administrator.

Relevant Policies

UTDBP3034 University Endowment Policy
UTDBP3004 Gifts and Grants from Private Philanthropic Sources
UTDPP1077 General Standards and Procedures Faculty Promotion Reappointment and Tenure
UTDPP1064 Procedures Governing Periodic Performance Evaluation of Tenured Faculty
UTDPP1089 Annual Review of Faculty
UTDPP1047 Evaluation of Academic Administrators

The University of Texas System Regents' Rule 60202

Policy History

- Issued: 2022-09-09

Policy Links

- Permalink for this policy: https://policy.utdallas.edu/utdpp1118
- Link to PDF version: https://policy.utdallas.edu/utdpp1118/makepdf
- Link to printable version: https://policy.utdallas.edu/utdpp1118/makeprint