

## CHECKLIST FOR ESTABLISHING AND NAMING AN ENDOWED CHAIR

**No recruitment may be conducted or endowed chair-holder nominated until a formal approval of the establishment of the endowed chair or cohesive series of endowed chairs is made by the Office of the President.**

### 1. Department/Dean in coordination with their Development Officer and in compliance with Development requirements

\_\_\_\_\_ After funding sources for the Endowed Chair are established, establishing documents are generated. They must include the following information.

- Academic discipline and/or scholarly research area for the endowed chair holder.
- Term of appointment as endowed chair (generally no more than 5 years/term).
- Whether the endowed chair holder is eligible for reappointment.
- Item for Action

\_\_\_\_\_ Once the establishing documents have been finalized, the Department Chair or Dean writes a position description which includes:

- Description and terms and expectations of the endowed chair, including a list of responsibilities that must be fulfilled by the holder of the endowed chair.
- Information about potential reappointment as holder of the endowed chair (if applicable) (insert reappointment checklist link)

\_\_\_\_\_ Academic Plan: Statement regarding the role of the endowed chair in fulfilling the unit's academic mission and/or an academic/strategic plan that incorporates the position description into the plan for the department.

\_\_\_\_\_ Forwards request for endowed chair along with the position description and the Academic Plan to the Dean's Office.

### 2. Dean in coordination with their Development Officer and in compliance with Development requirements

\_\_\_\_\_ Indicate how they plan to provide the FTE/salary for the endowed chair. Endowments which are to pay faculty salary or some portion of faculty salary should be so identified as part of any FTE/salary request.

\_\_\_\_\_ Add their comments regarding the programmatic importance/role of the endowed chair.

\_\_\_\_\_ Forwards the documentation to Advancement Services.

### 3. Vice Provost—Academic Affairs

Upon receiving the documentation from Advancement Services:

\_\_\_\_\_ Academic Affairs forwards the establishment document, Dean’s letter, position description and Academic Plan to the Committee on Planning and Budget (CPB) for their review.

\_\_\_\_\_ Once approved by CPB, Academic Affairs sends documentation to Advancement Services.

### 4. Chancellor

\_\_\_\_\_ Advancement Services forwards the documentation and a recommendation to the Chancellor.

\_\_\_\_\_ Chancellor provides a recommendation to Advancement Services.

\_\_\_\_\_ Advancement Services forwards the request for naming an Endowed Chair to the Office of the President for approval.

### 5. Office of the President

\_\_\_\_\_ Approves naming of the Endowed Chair.

Please note: Advancement Services receives the final approval notice from the Office of the President and forwards it to Academic Affairs. Academic Affairs will notify the Dean’s Office, which can begin the recruitment process. **The approval is not final until the President’s signature is received.**

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