

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 Chancellor.

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. Advancement Services

Upon receiving the documentation from the Dean's Office:

- _____ Reviews package for completeness and ensures compliance with donor/establishing documentation.
- _____ Forwards the documentation to Academic Affairs.

4. Vice Provost—Academic Affairs

Upon receiving the documentation from Advancement Services:

- _____ Academic Affairs forwards the establishment document, Item for Action, Dean's letter, position description and Academic Plan to the Committee on Planning and Budget (CPB) for their review.
- _____ Once endorsed by CPB, the Vice Provost for Academic Affairs evaluates and recommends the successful proposal request and notification is sent to Advancement Services.

4. Chancellor

- _____ Advancement Services forwards the respective documentation to the Chancellor for final approval consideration.
- _____ Chancellor provides approval of naming of the Endowed Chair to Advancement Services who 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 Chancellor's signature is received.**

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