

**Endowed Chairs
and
Distinguished Professorships**

What is an endowed chair?

An appointed position

- Appointed by the chancellor
- Supplementary to any other position held

Comes with funding

- Payout on invested endowment
- To be used for a defined purpose

What is a distinguished professorship?

The only difference between an endowed chair and a distinguished professorship is the size of the minimum endowment:

Endowed chair:	\$500,000
Distinguished Professorship:	\$2,500,000

Note: an endowed chair may be upgraded to a distinguished professorship if the endowment is increased to \$2.5 million

For the purposes of this presentation,
both endowed chairs
and distinguished professorships
will be referred to
as chairs, endowed chairs, or ECs.

Why are chairs created?

To financially support the University

- Teaching
- Research
- Service
- Salary support*

To memorialize individuals

- Outstanding faculty
- Donors, their family members or their physicians

To recruit and retain faculty

* A now-obsolete prohibition makes this unavailable for some chairs.

Who may hold an endowed chair?

Endowed chairs and professorships are reserved for distinguished scholars and teachers. (UC policy).

UCSF endowed chairs may be held only by UCSF faculty members. When a faculty appointment has terminated, the chair is automatically relinquished.

Some endowed chairs are attached to administrative or academic positions. They are automatically assigned to the holder of the position and relinquished by the holder on leaving the position.

For each endowed chair, unique requirements and restrictions may be made for who may hold the chair.

How may payout be used?

All endowment funds and their payouts should be used for the enrichment of University programs. (UC policy)

Uses of payout are uniquely defined for each chair, and may include:

- Research
- Teaching
- Service activities
- Salary support*

* A now-obsolete prohibition makes this unavailable for some chairs.

Establishing an Endowed Chair

What is needed to create an EC?

Definition

Name, purpose, eligibility requirements, how funds may be used

Funding

Source and amounts of funds, payment schedule

Establishment process

SOM approval process, campus process, OP process

How is a chair defined?

Defining document

States name, purpose, eligibility requirements, how funds may be used. May be embodied in

- Will or bequest from donor
- Endowed Chair Agreement between donor and UCSF Foundation
- Donation solicitation documents for a campaign
- Written request from from department chair to dean if discretionary funds are to be used

How is a chair named?

- Names may be clearly spelled out in defining documents.
- Problems may arise if names do not agree with donor wishes when funds are repurposed or combined.
- Problems may arise in naming for active faculty members.

How is a chair funded?

- Donor gift via outright gift, scheduled payments, will, unitrust
- Fund raising campaign among donor community, alumni, faculty when honoring a colleague
- Departmental Pro fees and discretionary funds
- Funds established by California Legislature

How is a chair established?

Once defining document is written and approved and funding is in place, the Endowed Chairs Office initiates and coordinates three rounds of approval:

- School of Medicine approval round
- Campus approval round
- Presidential approval round

At each stage the proposal will receive close scrutiny and must be approved before advancing to the next level. Once all parties have signed off, the President signs a letter establishing the chair.

How is a chair holder appointed?

- Dean notifies department chair that EC is established.
- Department chair requests appointment of a search committee and suggests members
- Academic Affairs vets committee
- Dean appoints and charges committee
- Committee recommends candidate
- Academic Affairs vets candidate
- Dean nominates candidate
- Chancellor appoints chair holder

Special types of chair

Academy chair

Administrative Chair

Term chair

Academy Chair

- Resides in Haile T. Debas Academy of Medical Educators
- Holder must be a member of the Academy
- To be used for education
- Limited to term of five years
- There is a maximum of two five-year terms per holder in departments with more than one eligible Academy member.
- Separate Academy approval round before School approval round

Administrative Chair

- Reserved for the holder of a particular administrative position.
- Automatically relinquished on departure of holder and assigned to new holder on appointment. Nomination procedure is not required.
- Payout must be used for support of the department or administrative unit for which the administrator is responsible (and is therefore unavailable for salary support).

Term Chair

- Holder is limited to a defined term.
- Term may be renewable, subject to limits or eligibility requirements as defined for individual chair.
- Payout is derived from a fund that is paid down as opposed to income on principal.

Resources

Endowed Chairs Office

The Endowed Chairs Office resides in the School of Medicine Dean's Office.

It initiates all action and is the central source for information in the establishment and appointment of endowed chairs in the UCSF School of Medicine.

It is the office of record in all matters pertaining to endowed chairs.

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Applicable policies

UC policy

University of California policy resides in the Office of the President and forms the basis for the policies of individual campuses and schools.

UCSF campus policy

Campus policy resides in the Office of the Chancellor and incorporates University policies.

School of Medicine policy

School of Medicine policy resides in the Office of the Dean and incorporates both University and campus policies.

University policies

UCOP endowed chairs policy:

APM – 191 - General University Policy Regarding Academic Appointees: Endowed Chairs and Professorships (rev 05-21-1998)
<http://www.ucop.edu/academic-personnel/files/apm/apm-191.pdf>

UCOP policy on naming in general:

Policy on Naming University Properties, Academic and Non-Academic Programs, and Facilities (12-19-2002)
<http://www.ucop.edu/ucophome/coordrev/policy/12-19-02att.pdf>

Campus policies

Endowed Chairs and Professorships

<http://policies.ucsf.edu/policy/100-14>

Development and Gifts Administration

<http://policies.ucsf.edu/policy/450>

School of Medicine Policies

School of Medicine Guidelines

<http://www.medschool.ucsf.edu/school-medicine-establishing-endowed-chairs-guidelines>

Haile T. Debas Academy of Medical Educators

http://www.medschool2.ucsf.edu/academy/Endowed_Chairs/Matched_policy_all.aspx