Purpose

Endowed chairs help departments support academically related activities and may provide payout to support the base salary and/or other salary components of a chair holder in support of his or her teaching, research, and service activities. Consistent with the intent of the gift or allocation instrument, an endowed chair may also provide support for an administrative position such as a Department chair, Director of an Organized Research Unit, or Dean.

Definitions

Endowed Chair

Supported by payout from an endowed fund, a fund functioning as an endowment, a gift, or an annual allocation. Campus guidelines and procedures apply to endowed chairs and endowed professorships including distinguished professorships. For convenience, all such entities will collectively be referred to as ?endowed chairs.? When there are distinctions between types of chairs, (e.g., funding levels) they will be noted in the following policy.

Policy

Establishment and disestablishment of endowed chairs at UCSF shall be consistent with University Policy.

A. A minimum principal of no less than $500,000 is required for the establishment of an endowed chair at UCSF. The Chancellor may approve exceptions, but in no case shall the minimum be less than $350,000 as specified in current University policy.

B. A minimum amount of no less that $1,500,000 is required for the establishment of a Distinguished Professorship. Individual schools may establish higher minima.

C. A current faculty appointment within the University is a prerequisite for appointment to and continuation of an appointment to an endowed chair. In the case of an administrative endowed chair, the administrative officer is automatically designated as the chair holder. An endowed chair may be filled by one individual for an indefinite period or for a prescribed period, unless otherwise provided in the terms of the gift or allocation instrument.

D. Plans to establish an endowed chair should be first discussed with the Assistant Vice
Chancellor for Development before gift prospects are approached or fund raising campaigns are initiated. The Development Office will review draft items from all four Schools for donor intent, financial details and any relevant policy matters.

E. A President’s Item shall be prepared by the Dean’s Office for the School of Medicine, or by the Development Office in consultation with the Deans of Dentistry, Nursing and Pharmacy for their respective schools. Attached to the Item shall be an endowed fund agreement or letter from a donor and any other appropriate supporting documents. Once finalized, the President’s Item and accompanying documentation will be circulated for review, approval and signature by the following:

1. Department Chair
2. Chief Financial Officer of the School
3. School academic affairs office
4. Dean of the School
5. Director, Development Administration & Financial Services
6. Assistant Vice Chancellor, University Development & Alumni Relations
7. Vice Chancellor, Advancement & Planning
8. Director, Faculty Relations
9. Chair, Senate Committee on Academic Personnel
10. Vice Chancellor, Academic Affairs

The Academic Vice Chancellor or designee shall transmit the President’s item and supporting documentation to the Chancellor, who will forward it to the President for approval.

F. Subject to the donor’s approval and upon recommendation by the Chancellor, the President, in consultation with General Counsel, is authorized to disestablish an endowed chair in the event that:

1. the subject area ceases to be consistent with the University’s mission; or
2. the endowed chair remains vacant for a period of three years and the Chancellor, after consultation with the appropriate Dean and Department Chair, determines there is no likelihood of filling the chair.

Upon disestablishment of an endowed chair funded through a gift, the fund payout shall be reallocated to the alternative purpose stated in the gift instrument or as subsequently specified by the donor in consultation with the Chancellor and the General Counsel. If a donor is deceased and has not specified an alternative purpose, the campus shall request the assistance of General Counsel to obtain court approval for an alternative use of fund payout.

Responsibilities

A. Responsibility for monitoring the procedures to establish endowed chairs rests with the
Office of the Academic Vice Chancellor.

B. The Academic Vice Chancellor or designee shall review the terms of endowed chairs at least every five years.

C. The Chancellor shall provide to the President on a fiscal-year basis a list of all endowed chairs noting which are filled, which are vacant and how long each vacancy has existed, which have been disestablished and the reallocation of chair funds.

References

- University Policy on Endowed Chairs and Professorships (APM191)
- Revised UCSF Guidelines For Endowed Chairs and Professorships (issued July 15, 1999)

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