

Requirements for Endowed Academic Positions

This document is intended to set forth the procedures for the appointment/selection and reappointment of faculty to endowed academic positions, as well as additional requirements for faculty holding endowed academic positions and fellowships. All endowed academic positions must meet the standards, criteria, and restrictions set forth by the donors whose contributions led to the establishment of these distinguished positions. See HOP policy, [ADM 06-403](#) (Endowed Appointments and Reappointments).

I. Procedures for Appointments to Endowed Academic Positions

In consultation with the appropriate department chair(s)/school director(s) and faculty, the dean will determine whether to request the position be filled through an internal or external search. For an external search involving an endowed academic position or fellowship, the dean of the college/school and the department chair/school director are responsible for following the institutional policies and procedures for hiring a new faculty member as well as the procedures detailed below.

A. Searches to Fill Endowed Academic Positions

This section sets forth the procedures to fill an endowed academic position.

1. The dean of the college/school will inform the Provost or other designated administrator (hereinafter “Provost”) that an endowed academic position has become available. To request a search, the dean must submit to the Provost the justification to fill the position and the timeline for the search process.
2. Once the dean receives the corresponding approval from the Provost, the dean will initiate the search process to fill the endowed academic position. The dean will have the primary responsibility for the organization and planning of the search process and must adhere to the Faculty Recruitment Manual when conducting external searches.
3. The dean will meet with the department chair(s)/school director(s) and faculty from the corresponding unit(s)/academic field(s) to appoint a search committee. The search committee is recommended to consist of a minimum of three (3) tenured full professors. The search committee shall be constituted as follows:
 - a. At least one of the search committee members must be a tenured full professor preferably from the department/school or, in the alternative, from an academic field within the college related to that of the endowed academic position.
 - b. At least one of the search committee members must be a tenured full professor,

preferably in the academic field that pertains to the endowed academic position, from outside the college *or* from another peer/aspirational institution of higher education.

- c. Preference for search committee membership should be given to faculty members who currently occupy endowed academic positions.
 - d. If the appointment is not restricted to a single department/school, procedures will be modified to ensure appropriate representation from potential areas of appointment.
4. The dean and the search committee will be charged with soliciting nominations for the endowed academic position from the relevant department(s)/school(s) and/or academic field(s).
 5. The dean and the search committee will ensure that there is an open and fair search process in which all qualified candidates will be given serious consideration.
 6. For internal searches, UTRGV faculty will be nominated by tenured full professors from within the nominees' department/school or affiliated areas; self-nominations will not be accepted.
 7. Nominees/applicants must have a strong scholarly record and substantive evidence of a distinguished career, especially during the three to five years immediately preceding the nomination/application.
 8. Nomination materials shall include:
 - a. A letter of nomination by a tenured full professor within the department/school or a related academic field to that of the nominee.
 - b. Two additional letters of recommendation from tenured full professors with a distinguished record of scholarship/creative work in the field of the nominee. One of the letters should be from an external (outside of UTRGV) faculty member from another peer/aspirational institution of higher education.
 - All letters should highlight the outstanding contributions and scholarship/creative work of the nominee that makes them an excellent candidate for this distinguished position.
 - c. An outline of a plan to use the endowment funding for innovative and state-of-the art contributions to their academic field, the discipline, and the institution.

- d. An up-to-date Curriculum Vitae (CV).
- e. Any other material that the search committee deems necessary and relevant to provide an overall evaluation of the candidate's outstanding contributions and scholarship/creative work in their field, and to demonstrate how the candidate meets the qualifications or terms that the donor may have specified. The additional information, if any, must be required of all nominees.

B. Selection of Candidate and Notice of Appointment

1. The search committee will make a recommendation to the dean that includes up to three (3) candidates for the endowed academic position. The search committee will submit all the supporting materials for their nominees to the dean. Exceptional or extraordinary accomplishments in teaching, scholarship/creative work, and professional service for each candidate, as well as how each candidate meets the qualifications or terms that the donor may have specified, must be clearly documented in the search committee's recommendations to the dean.
2. The dean will make a recommendation to the Provost that includes up to three (3) candidates for the endowed academic position. The dean will submit all the supporting materials and a detailed justification on the nominees to the Provost.
3. The Provost will submit a recommendation, including all supporting materials, to the President.
4. The President has final authority for approval of appointments except that under special circumstances and when authorized by the Chancellor, an endowed professorship may be granted to an outstanding faculty member prior to achieving full professor status.
5. In accordance with [The University of Texas System Board of Regents' Rules and Regulations Rule 60202 Section 2](#), "All initial or new holder appointments to a chair or professorship require prior approval by the Chancellor."
6. Once approval is received, the Provost will notify the selected candidate that they have been selected for the endowed academic position, informing them of all the rights, responsibilities, and obligations that this distinguished position entails. Copies of the notification, appointment letter, and other relevant documentation should be shared with Institutional Advancement.

C. Term of Appointment

1. In general, the initial appointment for an endowed professorship or chair (not to include

fellowships) will be for a three-year period. Subsequent reappointments may be made for additional terms following the process outlined in Section II of this document.

2. The endowed fellowship will be awarded for one year and may be renewed for one additional year.
3. Appointees that cause the endowment to be out of compliance at the end of any fiscal year may be immediately terminated from holding the position or may be required to go through the reappointment process. Restrictions on the use of the appointee's award amount may also be imposed while under review.
4. When an incumbent leaves the position, the dean shall be responsible for notifying the Provost, who shall then notify the EVP for Institutional Advancement.

II. Procedures for Reappointments to Endowed Academic Positions

This section sets forth the procedures to be followed for the reappointment of a faculty member to an endowed academic position. The Dean may elect an open search instead of offering a reappointment. If the Dean makes that election Section 1 procedures would apply. The current appointee is eligible to be nominated. Self-nominations will not be accepted.

1. Holders of an endowed academic position must submit a letter of application for reappointment, along with a detailed work plan for the next term of appointment. Endowed chairs/professorships must submit these documents by November 1 during the last year of their term, and endowed fellows must submit these documents by May 1 prior to the end of their 1-year term. The specific timeline for the review process will be set at the college/school level; however, the final recommendations should be sent to the Provost no later than March 1 or another pre-approved date set by the Provost.
2. Applications for renewal shall be sent through the department chairs/school director to the dean.
3. The candidate will also need to provide a current CV, annual reports, and other pertinent documentation, such as major publications or a dossier or portfolio containing the faculty member's most significant work or accomplishments during the endowment period.
4. The dean shall establish a review committee in consultation with the respective chairs/Director and faculty, and with the approval of the Provost. The review committee is recommended to consist of a minimum of three tenured full professors and shall be constituted as follows.
 - a. At least one of the review committee members must be a tenured full professor from

the department/school or academic field within the college and related to the endowed academic position.

- b. At least one of the review committee members must be a tenured full professor, preferably in the academic field related to the endowed academic position from outside the college, or from another peer/aspirational institution of higher education.
 - c. If the appointment is not restricted to a single department/school, procedures will be modified to ensure appropriate representation from potential areas of appointment.
 - d. Preference for review committee membership should be given to faculty members who currently hold endowed academic positions.
5. The review committee will be provided with all the materials submitted by the candidate (as outlined above).
6. The review committee will review all the relevant information to determine if the faculty member holding the endowed academic position has:
 - a. Worked to fulfill the conditions of the gift and any specific duties identified at the time of appointment;
 - b. Demonstrated continued excellence in teaching, scholarship/creative work, and service;
 - c. Fulfilled compliance requirements, such as submitting annual reports and using the allocated funds to meet the goals of the endowed academic position;
 - d. Actively participated in service activities for their home department/school, college, and University.
7. The review committee will submit a formal written review and recommendation to the dean.
 - a. The dean will thereafter prepare an evaluation and provide a written recommendation, together with the review committee's written review to the Provost. If, in the dean's assessment, the candidate is not fulfilling the expectations of the endowed academic position, the dean shall inform the candidate and will submit a recommendation to the Provost indicating the endowed appointment should not be renewed. The candidate shall have the opportunity to discuss this recommendation with the dean before the recommendation is submitted to the Provost.
 - b. All subsequent levels of review shall be furnished with all previous recommendations and the review committee's written review and provide a written recommendation to

the next level of review. The award amount and length of reappointment is to be included as part of the recommendation.

- c. The President has final authority for approval of appointments except that under special circumstances and when authorized by the Chancellor, an endowed professorship may be granted to an outstanding faculty member prior to achieving full professor status.

III. Temporary Assignment of Fellow to an Endowed Chair or Professorship

The following sections provide a temporary alternative to filling an endowed chair or professorship unless otherwise disallowed by the endowment agreement. One or more fellows may be appointed to an endowed academic chair or professorship for a term not to exceed one (1) year after the search failed to result in a full-tenured faculty being appointed. The fellow must be from the field of study that the endowed academic position is designated to support and is not required to be a full-tenured professor.

1. The existing search committee that performs the initial search will submit the fellow(s) being recommended for consideration to the dean. The package should include the CV, at least two recommendation letters and justification for temporary filling of the academic position with fellow(s).
2. The dean will make a recommendation to the Provost. The dean will submit all the supporting materials and a detailed justification of the nominees to the provost, and the EVP for Institutional Advancement.
3. The Provost will determine the award amount based on the available endowment distributions and take into consideration that enough funds are available to continue the search of a permanent appointee. The suggested award amount for a temporary fellow is \$10,000 or no more than 50% of the endowment's annual distribution, whichever is less. The Provost will notify the selected candidate that they have been selected as a fellow for the endowed academic position, informing them of all the rights, responsibilities, and obligations that this distinguished position entails.
4. The same rules apply to temporary fellows as they do to an endowed academic chair or professorship appointee.
 - a. The dean is responsible for ensuring that the search be reinstated to fill the endowed chair and professorship with a permanent holder within a reasonable time.
 - b. Challenges experienced in filling an endowed academic position shall be immediately reported to Institutional Advancement. For example, Institutional Advancement should be notified if the criteria restrictions impede any applicants from being eligible for appointment.

- c. All communication between the Donor and UTRGV related to endowments and gifts will be coordinated through Institutional Advancement.

IV. Additional Requirements for Faculty Holding Endowed Academic Positions

1. The holder of an endowed academic position must submit a workplan and expenditure budget to the dean and the Provost for approval within 30 days of initial appointment and no later than August 1 for each subsequent appointment year. The employee benefits associated with an endowment salary supplement must be drawn from the same source as the salary supplement itself. The total amount of salary supplement (stipend) requested plus associated benefits is recommended not to exceed 30% of the annual award amount allocated to the appointee from the endowment for the fiscal year in question and further it shall not exceed 3/9ths of the annual base salary of the appointee. Stipends from other sources may further affect the eligible amount. Annual salary supplements may vary over the course of an appointment; all proposed changes in salary supplement must be approved in writing by the dean, Provost, and the EVP for Institutional Advancement as part of the annual work plan and expenditure budget. In no event will endowment distributions be used to support any other source of funds to pay the base salary of the position holder when the holder is performing their regular duties.
2. By October 15th of each year, or before departure for faculty who are retiring or exiting UTRGV employment, the holder of an endowed academic position will be required to submit a report to the department chairs/school director, the dean, and the Provost regarding their activities and accomplishments during the preceding year, as it pertains to teaching, scholarship/creative work, and service. The annual report shall consist of two parts:
 - a. an accounting of how the funds (if any) were used during the preceding fiscal year, and
 - b. a report of activities/accomplishments in the preceding year. The report will be used to document the progress, achievements, and contributions of the faculty holding the endowed academic position or fellowship as well as to determine whether the appointment will be renewed at the appropriate time. This information will also be shared annually with the donor and/or donor's representative(s) in accordance with Regents' Rule 60202.

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