



# UNIVERSITY OF RICHMOND

## Policy Manual

<b>Policy #:</b>	15002	<b>Policy Title:</b>	Appointment of Endowed Chairs
<b>Effective:</b>	02/01/2014	<b>Responsible Office:</b>	Academic Affairs
<b>Revised:</b>	N/A	<b>Approval:</b>	University Faculty, Academic Deans, President’s Cabinet
<b>Last Reviewed:</b>	01/28/2014	<b>Replaces Policy:</b>	N/A

### PURPOSE:

This policy is designed to ensure that the University honors the intentions of donors and that income from endowed chair funds and other gifts designated for support of faculty and administrative positions are used effectively in supporting the University’s academic mission.

### SCOPE:

This policy applies to all donor restricted funds that have been established at the University of Richmond to support an endowed chair.

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### POLICY STATEMENT:

#### *15002.1 – Definitions*

##### Endowed Faculty Chairs

Endowed faculty chairs represent the highest academic honors that an institution can bestow upon faculty members. Typically, an appointment to an endowed faculty chair is made in recognition of the individual’s attainment of the highest levels of teaching, scholarship, research and service in his or her discipline or field.

##### Endowed Administrative Chairs

Endowed administrative chairs are created to support the recruitment and retention of administrators in key leadership capacities for the University. An appointment to an endowed administrative chair is made in recognition of the individual’s record of professional accomplishment and upon assumption of a leadership position associated with the chair.

# 15002 - Appointment of Endowed Chairs

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## *15002.2 – Appointment of Endowed Faculty Chairs*

Appointments to endowed faculty chairs should reflect the highest ideals of academic excellence and scholarly or creative achievement. Appointments to endowed chairs must comply with the terms of the gift documentation, applicable University and regulatory policies, and relevant sections of the Faculty Handbook. All appointments to endowed chairs are made by the Board of Trustees upon recommendation of the Provost and President.

### Terms of Appointment

1. In keeping with the purpose of endowed chairs as the highest academic honors an institution can bestow, endowed faculty chairs should be held only by full professors, unless otherwise specified in the gift documentation. In the unusual circumstance in which the appointment of an associate professor is in the best interest of the institution, candidates who hold the rank of associate professor may be appointed to an endowed chair where the teaching and scholarly achievements warrant.
2. In certain circumstances and only with the written approval of the Provost, distinguished visiting faculty may hold an endowed faculty chair when it is in the University's interest to do so and it is not inconsistent with the intentions expressed by the donor in the supporting gift documentation. An appointment to an endowed chair for a visitor is normally for a period of one academic year, but may be for a shorter period. School and University procedures for appointment of visitors will be followed in making visitor endowed chair appointments. All visiting endowed chair appointments require the approval of the Board of Trustees.
3. Candidates for appointment to an endowed faculty chair will have an outstanding record of teaching, research, publication, creative activity, scholarly achievement, and service, appropriate to the discipline and fields of specialization.
4. After reviewing the conditions of the gift agreement and supporting documentation, the Dean will submit a request to the Provost to fill the open faculty chair, identifying a preferred process and requesting to conduct either an external or internal search. The Provost will approve a selection process which specifies the scope of the search. The presumption is that the selection process will involve a formal search committee, though the Dean, with the approval of the faculty of the department or school that holds the endowed chair, may recommend that this requirement be waived in a particular case. The selection process employed will comply with applicable University and school-specific policies.
5. For new appointments or reappointments to endowed chairs made on or after February 1, 2014, the term as chair may be for the duration of the appointee's service on the faculty, or may be for a fixed term or renewable terms as proposed by the Dean and agreed to by the Provost. The presumption is that endowed chairs will not automatically rotate among department or school members unless an endowed chair has been established for this purpose by the donor, or the proposed departure is consistent with the donor's intent and it is in the interest of the University to do so. In the latter case, the Dean will make a recommendation to and obtain written approval from the Provost.
6. Conditions of the endowed chair will be set forth in the appointment letter, as will a statement of circumstances under which expectations may be modified. The appointment letter will also specify the official title associated with the chair as specified by the donor, the use of which must be considered a condition of service.

# 15002 - Appointment of Endowed Chairs

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## Responsibilities of an Endowed Faculty Chair

The holder of an endowed faculty chair is responsible for:

1. Fulfilling the conditions of the gift and any specific duties identified at the time of appointment;
2. Continuing to demonstrate evidence of excellence in teaching and scholarship, (research, or artistic production as appropriate), as documented in annual reports submitted by the chair holder;
3. Complying with the terms of the use of professional development funds, as specified in University of Richmond Endowment Policy;
4. Actively participating in the chair holder's home department and/or school; and
5. Complying with the review policy of the chair holder's school.

## Transition to this Policy

Individuals holding an endowed faculty chair as of February 1, 2014 will be permitted to fulfill the remainder of their terms, consistent with the intent of the donor as expressed in the gift agreement and related documentation. When an endowed chair becomes vacant, the appointment of a new chair holder will be made in accordance with this policy and the gift documentation.

### *15002.3 – Appointment of Endowed Administrative Chairs*

Appointments to endowed administrative chairs are made in recognition of the chair holder's record of professional accomplishment and assumption of a significant leadership position within the School or University. Appointments to endowed chairs must comply with the terms of the gift documentation and applicable University and regulatory policies. All appointments to endowed administrative chairs are made by the Board of Trustees upon recommendation of the President.

## Terms of Appointment

1. Endowed administrative chairs may be held by individuals with faculty status when appropriate, but the primary criterion for appointment is fitness for the administrative duties of the chair. The status of previous incumbents does not dictate whether a chair holder should have faculty status.
2. Interim or visiting administrators shall not hold endowed administrative chairs, unless the chair was specifically established for this purpose.
3. The appointment to an endowed administrative chair is intended for the position, not the person. An individual appointed to an endowed administrative chair will hold such chair until the conclusion of his or her term of service in that leadership position. If the chair holder leaves that position to assume another role in the University, including as a member of the faculty, he or she will relinquish the administrative chair.

## Responsibilities of an Endowed Administrative Chair

The holder of an endowed administrative chair is responsible for:

1. Fulfilling the conditions of the gift and any specific duties identified at the time of appointment;
2. Continuing to demonstrate evidence of excellence in administrative leadership, as documented in annual reports submitted by the chair holder; and
3. Complying with the review policy of the chair holder's division or with the review policy for members of the president's direct reports, as appropriate.

## 15002 - Appointment of Endowed Chairs

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### *15002.4 – Selection of Endowed Chairs*

While the gift agreement between the donor and the University may establish selection criteria for an endowed faculty or administrative chair, the agreement should not contain a provision giving the donor or his or her designee the right to participate in the selection of the endowed chair holder. Instead, consistent with the criteria set forth in the gift agreement, the University should have the discretion to recommend individuals for appointment to endowed chairs in a manner that best serves the strategic objectives of the University and, for faculty appointments, adheres to the principles of faculty governance. All appointments to endowed chairs are made by the Board of Trustees.

Unless otherwise stipulated in the gift documentation, an appointment to an endowed faculty or administrative chair may be made to a current employee of the University or an outside candidate. In the case of endowed faculty chairs, the determination of internal versus external appointments will be approved by the Provost upon recommendation by the appropriate Dean, in accordance with the process in section 15002.2 (Appointment of Endowed Faculty Chairs, *Terms of Appointment*, item 4) of this document.

### *15002.5 – Names of Endowed Chairs*

Names of endowed chairs are typically a core component of the gift agreements and may not be altered except by appropriate modification of donor restrictions. The determination as to whether a name change is appropriate and the steps to be taken if the change is warranted will be made by the Provost, in consultation with the Dean of the school, the Vice President for Advancement, and General Counsel for endowed faculty chairs. For endowed administrative chairs, the determination and steps to be taken will be made by the President, in consultation with the Vice President for Advancement and General Counsel. The Board of Trustees, upon the recommendation of the President, must approve the name change.

### **RELATED POLICIES:**

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N/A

### **COGNIZANT UNIVERSITY OFFICIAL:**

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Provost & Vice-President for Academic Affairs