

STANDARD ADMINISTRATIVE PROCEDURE

12.01.99.M1.01 Appointment, Evaluation, and Reappointment of Endowed Position Holders

Approved May 30, 1997

Revised March 23, 2010

Revised March 18, 2021

Draft Revised February 26, 2024

Next scheduled review: February 26, 2029

Standard Administrative Procedure Statement and Reason

The following guidelines apply to the appointment, evaluation, and reappointment of tenured, tenure track, and academic professional track faculty to endowed positions, as well as the budgetary guidelines associated with such positions. These guidelines will be effective January 2, 2024, and will be applied to all existing endowed positions as well as those appointed after that date. When academic professional track faculty are appointed to the endowed positions appropriate adjectives are used (e.g., Jane Doe Professor of Practice). The principal categories of endowments used in support of faculty scholars and educators at Texas A&M University are

- endowed chairs;
- endowed professorships;
- endowed assistant and associate professorships;
- endowed career development professorships; and
- endowed faculty fellowships.

To support endowed positions with awards matching their level of distinction, the following minimum balances for endowments created after January 2, 2024, are expected so that annual earnings generated can help meet the goals and priorities of colleges/schools. Colleges/schools may set higher minimum balances than those below.

President's Chair, \$10,000,000

Presidential Chairs, \$5,000,000

Dean's Chair, \$3,500,000

Department Head Chair, \$2,500,000

Chair, \$1,000,000

Professorship, \$500,000

Assistant / Associate Professorship, \$250,000

Career Development Professorship, \$250,000

Faculty Fellowship, \$150,000

Definitions and General Selection Criteria

In all instances, selection criteria for appointments to endowed faculty positions, as well as budgetary approvals, will reflect the donor intent and the stated priorities and restrictions established when the position was created. Unless otherwise approved by the president or president's designee, endowed positions should not be appointed until the endowment is fully funded. The following general definitions and selection criteria will apply to the principal endowment categories. Within each category, the same standards apply for selection and rules apply.

Endowed Chair - The holder of an endowed chair should be considered as receiving one of the highest honors that can be bestowed on a faculty member. The highest level of performance, and national and/or international recognition of that performance, are inherent guidelines for appointment of a chair holder. The institutional expectation of unquestionable excellence must be met in addition to any specific selection criteria associated with a particular endowed position. The appointment to an endowed chair may recognize a current member of the faculty or it may be associated with recruitment of a new faculty member, or it may be associated with retention of a current faculty member; but, in all appointments, excellence should be evidenced by several years of outstanding performance based on national and international standards.

Endowed Professorship - The holder of an endowed professorship should be considered as receiving a high honor, as well as recognition of consistently outstanding performance and ability. The institutional expectation of a distinguished record of performance in one of the three professional performance dimensions must be met in addition to any specific selection criteria associated with a particular endowed position. The appointment to an endowed professorship may recognize a current member of the faculty or it may be associated with the recruitment of a new faculty member or retention of a current faculty member.

Endowed Assistant and Associate Professorship – The awarding of an endowed assistant and associate professorship is generally to recognize and encourage a faculty member who has demonstrated superior performance in appropriate areas of expectations and who has displayed significant promise for future eminence in appropriate areas of performance or it may be used to recruit a faculty member at the rank of assistant or associate professor. The institutional expectation of the promise of superior performance must be met, as well as any criteria stated in the donor document.

Endowed Career Development Professorship – The awarding of an endowed career development professorship is generally to recognize and encourage a faculty member who has achieved distinction or who has displayed significant promise for future eminence in research and/or teaching. Holders of career development professorships should be below the rank of full professor.

Endowed Faculty Fellowship - The awarding of an endowed faculty fellowship generally is to recognize and encourage a current member of the faculty who has achieved distinction or who has displayed significant promise for future eminence in research and/or teaching. The institutional

expectation of the promise of higher performance must be met, as well as any criteria stated in the donor document.

Role-specific Endowed Positions - Administrative endowed chairs and professorships, e.g., Department Head's Chair or Dean's Chair, are attached to the individual holding that particular administrative appointment while the person holds the position and are relinquished when they no longer do.

Official Rule /Responsibilities/Process

1. APPOINTMENT, REVIEW, AND REAPPOINTMENT PROCEDURES

- 1.1. Selection - The selection process will be initiated by the college/school dean (for non-department-specific positions) or the department head (for department-specific positions). In every instance, this selection process shall include advice and counsel from an appropriate faculty committee(s) appointed or recognized by the dean. Each college/school will determine if external letters should be solicited for nomination packages for endowed title holders, and if so, incorporate this requirement into the college guidelines. Units with a requirement for external letters should develop and use a template to ensure consistency when seeking external letters as a part of the process of evaluating candidates for endowed positions.

- 1.2. Appointments - To hold an endowed chair, endowed professorship, endowed assistant and associate professorship, career development professorship, or fellowship, the faculty member needs to be and must remain in good standing with the university. Once a candidate has been selected for appointment, the college dean shall initiate a request for appointment which includes sufficient information and justification for review and evaluation by the administration. Recommendations of the faculty committee(s) and the department head should accompany the request for approval at subsequent steps in the approval process. Appointments to endowed chairs, endowed professorships, endowed assistant and associate professorships, and career development professorships require the approval of the president or president's designee through Faculty Affairs, and appointments to endowed faculty fellowships require the approval of the college/school dean.

Appointments shall be consistent with all applicable University Rules and Standard Administrative Procedures. Appointment letters should include specific reference to the term of the appointment (including permanent appointments), rules on periodic review and reappointment, and the management of earnings from endowment-related funds. While special conditions may be established by mutual consent and with the approval of the president or president's designee, unusual and extraordinary conditions are discouraged and shall in no case be in conflict with University Rules or System Policies.

- 1.3 Periodic review- Continued appointment to endowed chairs/professorships/fellowships is contingent upon satisfactory performance. Chair and professorship holders shall be reviewed every five (5) years, with the opportunity for accomplishment-based renewal(s) including a review process, or the ability to re-compete for the honor clearly described in college/school guidelines. This review should be conducted in tandem with the post-tenure review.

Endowed assistant and associate professorships, career development professorships, and fellowships should be reviewed every (3) years. For endowed appointments restricted to assistant or associate professors, appointees will cease to hold their current endowed positions upon promotion to the next rank.

- 1.4 Evaluations and Reappointments - Under no circumstance should reappointments be made, without review by the appropriate faculty committee or committees, college/school dean, and/or department head. All reappointment requests must include a faculty peer committee recommendation, the department head's recommendation, and the dean's recommendation. When the college/school dean elects to use an endowed position for recruitment or retention purposes, the faculty committee review process is still required.

1.4.1. Each college/school will appoint a faculty committee to review appointments and reappointments of endowed chairs, endowed professorships, endowed assistant and associate professorships, career development professorships, and fellowships based on the gift agreement criteria and college/school guidelines. This review will occur near the end of each term of appointment. This committee will make recommendations to the dean about appointments and reappointments. Combining this recommendation with other independent information, the dean will make a recommendation to the provost and executive vice president through Faculty Affairs, on appointments and reappointments. The provost and executive vice president may ask for additional information in making the decision to approve or deny the recommendation.

1.4.2. The faculty committee evaluation report for appointment and reappointment to an endowed chair or professorship, should also address the post-tenure peer review of the endowed chair or professorship holder. A statement addressing this evaluation process should be included in the committee report.

1.4.3. Appointment and reappointment submission documentation should be submitted to faculty affairs for review and consideration at least one month prior to the proposed appointment or reappointment effective date. Said documentation should include the following, in this order: 1) Request memo from the department head, through the dean to the vice provost for faculty affairs, summarizing the selection/review process. This memo should also

include the financial details associated with the endowment, in line with the gift agreement and specific college/school guidelines. 2) Signed department and college/school peer review committee reports. These reports should include a statement endorsing the post-tenure peer review assessment of the candidate if the committee is conducting this peer review simultaneously. This practice is encouraged. 3) Draft of the endowed appointment letter, which should include the specific endowed appointment title to be used by the faculty member on correspondence, publications, and any web presence. In line with the gift agreement and any specific college/school guidelines, the letter should also include the term and reappointment information, financial details, stating any requirements related to responsible stewardship, such as annual letters to the donor, and spending allowances. 4) CV of the prospective endowed appointment holder.

The use of endowed position titles and associated funds by the endowed position holders must cease at the conclusion of the endowed position terms.

2. BUDGETARY GUIDELINES

- 2.1. All expenditures of income generated by endowed chair, endowed professorship, endowed assistant and associate professorship, career development professorship, and faculty fellowship endowments must be in accordance with the original gift agreement and applicable University Rules. Expenditures of income shall be at the discretion of the chair/professorship/fellowship holder. Colleges/schools/departments shall place no restriction on the allocation or expenditure of funds beyond those specified by the original gift agreement and applicable University Rules. The Texas A&M Foundation will coordinate financial reporting of endowment performance directly with the University Chief Financial Officer. The Foundation will make decisions about endowment investments. The annual allocations of proceeds may fluctuate due to market conditions and the performance of endowment investments.
22. When an endowed chair, professorship, or fellowship is vacant, earnings from the endowment cannot be spent by the college/school or department without the prior approval of the president or their designee, and any spending must be in accordance with the gift agreement.
23. When role-specific endowed positions are held by faculty appointed on an interim basis, generated annual earnings will be spent in accordance with gift agreement parameters when consent is given by the respective dean for interim department head chairs and by the Provost and Executive Vice President for interim dean appointments.
24. The University Chief Financial Officer is expected to monitor the size of each vacant endowment. If the endowment has the capacity to support additional positions, then the CFO and in collaboration with the Texas A&M Foundation, the dean of the

respective college/school, and/or the department head can potentially create additional endowed positions with the donor's consent to recognize, retain, and recruit high-quality faculty.

3. EXCEPTIONS TO THESE POLICIES

Any exceptions to these policies require the approval of the president.

Related Statutes, Policies, or Requirements

Supplements [System Policy 12.01](#) and [University Rule 12.01.99.M1](#)

Contact Office - President
