

Named Positions Request Form

(Professorships and Directorships)

Necessary approvals may take up to two weeks. Please plan accordingly.

This form is intended for communication of requested changes affecting endowed named positions. The completion of this form does not supersede existing change processes or imply the requested change has been approved. Approval for all actions listed below is required by the Office of the Provost per the gift agreements.

Email completed form to endowed-change-request-list@nd.edu. This listserv is maintained to include all parties involved in the administration of these positions.

Endowed Fund # beginning in 6:

Purpose of Request (check multiple if applicable):

- Fund Activation
- New Appointee
- Change to Appointee
- Professorship Name/Title Change
- Request for new fund from excess earnings (Fund Split)

Complete only the section(s) below that pertain to the purpose(s) of this request

FUND ACTIVATION:

- *Activation and recruitment may begin upon receipt of 75% of the pledge amount, if explicitly stated in the gift agreement. Otherwise, activation cannot be made unless the full pledge has been received.*
- *Appointment can be made once the fund is activated (even if the reserve is still being established).*

Has the pledge been met (at least 75%):

Rationale for Activation:

NEW OR CHANGE OF APPOINTEE: *Attach draft appointment letter (if applicable)*

Naming Guidelines:

- *Going forward, references should be made to “professorships” instead of “chairs.” Faculty are appointed as Donor Professor or Donor Professor in X.*
- *Follow gift agreement if specific name is indicated.*
- *If discipline is not specified in the gift agreement, leave it out of the name/title.*
- *Appointment to a professorship for Assistant or Associate Professors should include rank in the professorship name to distinguish appointment from “Endowed Professor” (if the appointment to junior faculty is permitted under the gift agreement).*

- *If appointment to a professorship is made to a faculty member who is a full professor, however has not been approved by the Named University Chair Review Committees, use “College Professor” to distinguish appointment from “Endowed Professor.”*
- *Professorship splits should indicate # (i.e., III, IV, V). Under the newer gift agreement language, “the fund may be divided ... to create a professorship which shall also be known as ... and subsequently numbered. Any subsequent professorships will be subject to the provisions set forth in this agreement (i.e., original restrictions carry forward to split).*

Approvals :

- *Appointment to an "Endowed Professor" requires approval of the Named University Chair Review Committees, Dean approval, Provost approval and president approval.*
- *Appointment to a professorship does not require the “approval” of the Provost per the Academic Articles; however, current business process suggests a review with the Stewardship team should occur **IN ADVANCE** of the notification to the faculty member to ensure compliance with the gift agreement.*

Name of recommended appointee:

Current rank of recommended appointee:

If tenured, has the Named University Chair Review Committee approved this appointment?

Effective date for appointment:

Length of appointment if **not** tenured:

Expected portion of salary to be covered by endowment earnings (percentage):

Will endowment provide discretionary funding?

If yes, please provide anticipated annual discretionary amount:

NAME/TITLE CHANGE:

Naming Guidelines:

- *Please review the naming guidelines above.*

Current professorship name/title:

Proposed new name/title:

Rationale for the change:

REQUEST FOR NEW FUND FROM EXCESS EARNINGS (Fund Split):

New Fund Guidelines:

- *Ability to divide the established fund must be allowable per the gift agreement.*
- *Typical agreement language includes the ability to fund additional professorships which will carry the same provisions/restrictions as documented in the original gift agreement. The professorship name will be sequentially numbered (i.e., II, III, IV, V).*
- *Please review the naming guidelines above.*

Proposed Split
Percentage
(Original/New):

Original Name/Title:

Proposed New Name/Title:

Rationale:

Additional Information or Comments:

Checklist:

1. Fill out the section or section(s) that specifically pertains to your request
2. Attach pertinent documentation, including gift agreement if available and any applicable departmental correspondence
3. Attach DRAFT appointment letter for new appointments/name changes
4. Email completed form and any attachments to endowed-change-request-list@nd.edu

Approved by:

Date:

Stewardship will document all approvals for permanent records.