**Guiding principles for implementation**

The Office of the Provost and University Advancement agree that the Guidelines for Endowed Faculty Positions must be implemented over time so as to not disadvantage existing position holders or schools and colleges who have negotiated and structured payouts for salary stipends and research funds in varying ways and levels.

The taskforce recommends the following principles to guide implementation.

• All new endowed positions are subject to the guidelines, including categories of endowed positions, naming minimums, and payouts.

• Existing endowed positions will be aligned to the guidelines as positions are vacated and available for reassignment.

• Appointments are subject to a six-year term unless otherwise specified in the donor language or guidelines (e.g. deanship, faculty fellow, visiting professor).

• Renewed appointments for existing position holders are not subject to the guideline’s payout requirements and may continue to honor existing negotiated terms.

• Renewed appointments for existing position holders should be awarded in alignment with the faculty member’s next review period.

• The provost may approve a waiver from these guidelines upon request and extenuating circumstances.

**Process for appointing and renewing endowed faculty positions**

Step 1. Dean submits an informal request to appoint a faculty member to an endowed position to the Office of the Provost with a brief rationale. If appointments are reviewed and renewed on an annual schedule within the school or college, the Dean may submit a list of all requests at one time.

Step 2. Dean’s office drafts an appointment letter, using the template as guidance, and sends it to Noemi Sepe Nsepe@uoregon.edu, at the Office of the Provost for review.

Step 3. The Office of the Provost will then work with Stewardship to ensure that the terms align with the Guidelines for Endowed Faculty Positions and the donor language of the endowment. This step is subject to feedback and recommendations.

Step 4. Once the Office of the Provost and the Dean have agreed on the language in the finalized appointment letter, Chuck Triplett will forward it to the Provost for review and approval.

Step 5. Provost approves the endowed position and appointment terms.

Step 6. Dean appoints the faculty member to the position, secures necessary signatures, and submits a final copy of the appointment to the Office of the Provost for recording.

Step 7. New appointments will be contacted by Stewardship for the onboarding process.

\*If you would like an exception made to the guiding principles, please reach out to Chuck Triplett at CLT@uoregon.edu and Noemi Sepe at Nsepe@uoregon.edu. Below you will find an appointment template for your consideration.

[MM/DD/YYYY]

[Appointee]

[Department]

University of Oregon

Dear [Appointee]

Based upon the enthusiastic recommendation of your department head and the [Dean and/or Divisional Dean], I am pleased to [appoint/renew] you as the [title], commencing [start date]. This appointment is renewable upon successful review for [six-year/or other terms as described in donor language], reviews will coincide with your [post tenure/performance] review schedule, with the first review occurring in the [yyyy-yy] academic year.

Your appointment as [title] includes the following: [$ total] each year, distributed as [$ in Salary Stipend + OPE] and/or [$ in Research Support].

Research funds may be used for any legitimate research needs with the exception of buying out teaching responsibilities during the academic year. Allowable use of research funds includes but are not limited to: summer wages + OPE, graduate student research assistantships, travel expenses, research equipment, and expense of professional materials. Endowed position holders are encouraged to consider ways in which their expenditures of research funds for their teaching and research activities will also provide institutional benefit to their departments, such as graduate student research and support in the area of the position holder.

The balance of your accumulated research funds may not exceed four times the annual research allocation. Annual allocations of research support will be adjusted as needed to ensure the balance is no higher than [$ amount].

We ask that you include your named title, “[title]”, on your CV and official correspondence as a way to honor your donors who have made this support possible. Congratulations on this significant accomplishment and thank you for your continued contributions to the educational mission and goals of the University of Oregon.

Appointee Signature & Date

Approving Dean Signature & Date