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GUIDELINES FOR THE REVIEW OF APPOINTMENTS TO ENDOWED CHAIRS AND PROFESSORSHIPS PROTOCOL DOCUMENT

(Submitted by Faculty Affairs UPC and Approved by President: March, 2005; Revised and Approved by Council of Deans: August 27, 2013; Revised and Approved by Council of Deans: May 26, 2022)

Introduction

Endowed chairs and professorships are donor-funded positions of distinction aimed to attract and retain exceptional faculty who have distinguished themselves through their research and scholarly or creative activity. These appointments are among the highest and most prestigious at Loyola University Chicago. The recognition of distinguished faculty through such appointments reflects Loyola's strategic priority to promote extraordinary success in academics and research.

Endowed Junior Professorships:

The university maintains several endowed junior professorships that are distinguished from a professorship or chair held by a tenured faculty member. This section describes these junior professorships and chairs.

1. The purpose of these appointments is to recruit talented teaching-scholars to the University faculty. Candidates are persons qualified to hold tenure track appointment and who show exceptional promise in their early years in the profession. (Exceptions to a tenure track appointment are possible if a non-tenure stream position is specified in the endowment's enabling documentation.) Appointment may be made at the rank of assistant professor (for advanced assistant professors) or associate professor. Appointments as endowment-supported junior professors cannot be more than six years in duration and they automatically discontinue if the person is promoted to the rank of Professor. The appointment process must follow [Loyola University faculty hiring protocols](#) and procedures.
1. The faculty responsibilities of a person holding a junior professorship are the same as other faculty of the same rank and research classification (e.g. research-intensive, research-active). Depending on the conditions of the enabling documentation, the endowment may provide the person with support for research, professional development, or teaching related expenses.
2. Persons appointed to endowed junior professorships shall be evaluated following the same procedures that apply to other junior faculty. Petitions for tenure and promotion



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of endowed junior professors will be evaluated with the expectation of higher levels of productivity in proportion to the additional resources made available to the candidate. Being appointed as the holder of an endowed junior professorship is not a guarantee of future tenure. If at any point the person is deemed not to be making steady and strong progress toward tenure, the dean may recommend that the honor of the holding the endowed junior professorship be withdrawn, e.g. effective at the end of the academic year.

The remainder of this protocol considers professorships and chairs held by tenured faculty.

Criteria and Procedures for Endowed Chairs and Professorships

Endowed chairs and professorships are situated in a range of disciplines and academic units for the purpose of one or more of the following:

- To enhance research competitiveness in securing funding and external research support.
- To strengthen the capacity of departments to achieve national and international prominence in research/creative activity.
- To recruit and/or retain exemplary professors.

Criteria for appointments to endowed chairs must reflect an exceptional standard of academic excellence and scholarly or creative achievement. Procedures for recruitment must be consistent with the stipulations of the endowment, Loyola University Chicago protocols for hiring for mission and diversity, and other administrative procedures established in the Office of the Provost and various academic units. Involvement of the faculty, students, and others as appropriate is essential in the review and recommendation of candidates for appointment to endowed chairs and professorships.

I. General Criteria for Appointments

The following general criteria will be used in the review and recommendation of candidates for appointment to endowed chairs/professors:

1. An exceptional record of productive research, publication, creative activity, and scholarly achievement appropriate to the discipline and fields of specialization.
2. Evidence of a continuing record of exemplary academic and professional citizenship appropriate to the discipline or profession.
3. Evidence of achievement of a professional status at the national or international level which will enhance the stature of the University's faculty.
4. Evidence of exemplary teaching.



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5. Evidence of mentorship of faculty, particularly junior faculty, in the candidate's discipline and within the candidate's home academic unit.

Each successful candidate should present a record sufficiently consistent in quantity and/or quality to warrant the expectation of continued performance and contributions at an outstanding level.

The endowed chair/professor is also expected to operate within their academic unit as a regular faculty member. This involves full interaction with other faculty members, a teaching load involving undergraduate and/or graduate courses, and responsibilities for student supervision and committee assignments. The endowed chair/professorship holder's activities, teaching load, other assignments, and any modifications in compensation arrangements will be reviewed annually with the Dean and/or relevant department chair(s), subject to departmental and College policy and existing agreements. There is an expectation that the endowed chair/professorship holder have regular teaching responsibilities. A teaching load of two courses per year (or something comparable dependent on the academic unit) is suggested, but this may be determined by the Dean and/or relevant department chair, with consideration for the stipulations of the endowment.

* Endowed chairs/professors in some departments or schools are used for visiting or rotating appointments, referred to as Endowed Visiting Chairs or Professorships. These appointments are generally for periods less than one year and involve no continuing commitment by the University. Procedures described in this policy do not apply to these appointments but are applicable to appointments which exceed one year and may include tenure or some other long-term commitment by the University.

II. Procedures for Recruitment of Candidates for Endowed Chairs

Procedures for recruitment and recommendation of candidates for appointment to endowed chairs will conform to stipulations of the endowment. In the case of University endowed chairs/professorships, the Office of the Provost will consult with the Deans to make a determination as to which school will receive the chair/professorship. Once a decision is made, the appointment process should begin with step 1 below. The academic unit is the school/college that is designated to receive the University endowed chair/professorship. Periodic review of University Chairs/Professorships should follow the steps outlined in Section VI, also following the stipulations of the endowment.



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The Provost makes all appointments to endowed chairs/professorships after considering (1) the evaluations and recommendation of the faculty of a department and School, and/or (2) the recommendation of a search committee, as described below:

2. When a new endowed chair/professorship is established or when a vacancy occurs, the Dean of the appropriate School will convene a Search Committee. The Dean will meet with faculty in the academic unit to determine the size and composition of the search committee. Faculty members from the academic unit will be appointed by the Dean and will constitute a majority of the search committee. Other members may be appointed to the committee by the Dean in consultation with the Vice Provost for Faculty Administration and Provost. The Dean may choose to chair the committee or may designate a faculty member appointed from the academic unit to chair the search committee.
3. Committees must follow [Loyola University faculty hiring protocols](#) and procedures.
4. Throughout the search process, the committee shall solicit, encourage, and provide for faculty participation and the participation of other constituent groups. Faculty who are not members of the search committee should have ample opportunity to review the credentials of qualified candidates provided that the search committee may protect the identity of candidates who request confidentiality during the initial screening process.
5. Under the discretion of the dean, endowed chair holders and professorships may receive external letters of evaluation. The external reviewers should be at full professor rank at peer or aspirant universities. The endowed position holder may select at most half of the external reviewers.

On-campus interviews scheduled should allow for discussions with the Provost, Deans, chairpersons, search committee members, faculty, and, where appropriate to the nature of the search, with students, alumni, and others. Every reasonable effort should be made to obtain the views of the faculty in the academic unit and appropriately interested constituent groups. General support of the faculty in the academic unit will normally be necessary for further consideration of a candidate. In cases where the appointment includes the award of tenure, the tenured faculty in the academic unit should follow the normal tenure evaluation process before the Dean makes a recommendation to the Provost.

6. It shall be the responsibility of the search committee to submit to the Dean a summary of evaluations, advice received from the faculty on each person interviewed, the search committee's own evaluation of the candidates, and external letters, if applicable. Subsequently, the Dean makes a recommendation to the Provost.



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7. When the provost has approved the hiring of a candidate, the candidate must undergo the review process for the endowed chair, similar to a tenure review when this is offered to a new faculty hire. This review should be conducted in an expedited manner, parallel to expedited tenure review when tenure is also being offered. This review process follows the standard tenure protocol for the school/college: academic unit, school/college rank and tenure committee, dean, university rank and tenure committee, and provost.
8. In the event the search committee and Dean do not find a successful candidate for presentation to the Provost, the search process normally shall be continued within that academic year. If it should become necessary to reopen the search, the Dean and the search committee may confer to establish further direction; if it appears desirable, a new search committee may be formed.
9. In some cases, funds from the endowment may not be sufficient to justify a national or international search to fill a new or vacant position. In other cases, a School may desire to fill a new or vacant position internally (that is, without an external search). In these cases, the Dean of the school must consult with the Provost for approval. In both instances an internal search (within the Department or School) will be organized and overseen by the Dean. The search should follow the process outlined here.
10. The President and the Provost notify the Loyola University Chicago Board of Trustees of any endowed chair/professor appointments at its first scheduled meeting following approval.

III. Terms of Appointment to Endowed Chairs/Professorships

1. For a limited number of existing endowed chairs/professors, the appointment period of the chair/professorship is unspecified in accordance with the agreements that established these chairs.
2. New appointments or reappointments to an endowed chair/professorship will be for a specific term not to exceed five (5) years except where the terms of the endowment specify a duration.

IV. Responsibilities of an Endowed Chair/Professorship

The holder of an endowed chair/professorship is responsible for:



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1. Fulfilling the conditions of the donor and any specific duties identified at the time of appointment
2. Continuing to show evidence of excellence in scholarship, research, or artistic production at a level that maintains a prominent national and international profile as defined by the academic unit. This should be production at a level considerably greater than the expectations that are set by the academic unit for a research-intensive faculty member.
3. Submitting an annual report of activities to his/her Dean, and
4. Participating actively in the individual's home department or school, particularly the mentorship of young researchers and the building of research within the unit.

V. Responsibilities of the Dean

The Dean of the School will:

1. Recommend to the Provost, at the time of the initial appointment, the specific salary, duties and conditions to which the holder of the endowed chair/professorship must adhere.
2. Assume main responsibility for conducting periodic reviews as outlined above.

VI. Periodic Review Procedures

The holder of a named endowed chair or endowed professorship shall be evaluated annually in accordance with the policies and procedures used to evaluate other continuing tenured faculty in his or her department and school.

1. If the endowed position is renewable, endowed position holders will be reviewed every five (5) years or during the final year of a term appointment.
2. Responsibility for conducting all reviews rests with the appropriate Dean, in collaboration with the Office of the Provost. Chair/Professorship holders will be notified of upcoming reviews by the Office of Faculty Affairs and given sufficient time to compile a dossier of relevant materials.
3. Upon receipt of notification of the review, the endowed position holder will assemble a dossier which includes, at a minimum:
 - a. Current curriculum vitae (listing publications, presentations, awards, honors, performances and/or exhibitions)
 - b. A personal statement of past, present, and future research, scholarly or artistic work, and teaching.
 - c. Copies of major publications and/or a portfolio of finished work or art that have occurred during the period under review.



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- d. An accounting of how funds from the endowment were used to support their research and professional development (assuming that such funds are made available).
- e. Goals for next term

4. Under the discretion of the dean, endowed chair holders and professorships may receive external letters of evaluation. The external reviewers should be at full professor rank at peer or aspirant universities. The endowed position holder may select at most half of the external reviewers.

5. The academic unit of the endowed chair/professor is the first to review the assembled materials. The review committee within the academic unit should be composed of the full professors, either all or a representative subset, within the academic unit. If the composition of the academic unit is such that there are fewer than four faculty on the review committee, the dean, in consultation with the provost's office, should complete the four-person committee by appointing additional full professors at Loyola from a field related to the endowed chair's primary research area. Evaluation letters from the academic unit, the school rank and tenure committee, and the Dean are added to the endowed position holder's materials as those entities complete their review. Finally, all candidates must undergo review by the University Rank and Tenure Committee.

6. At the conclusion of the review, the Provost will make one of the following recommendations:

- a. Reaffirmation of the candidate to continue in the chair/professorship, or
- b. Termination of the appointment. This may include the elimination of the endowed component of salary, depending on the faculty member's contract.