21.05.01.C0.03 Endowed Non-Faculty Positions

Approved: December 11, 2023
Next Scheduled Review: December 11, 2028

Procedure Summary

In accordance with Texas A&M University System regulation *21.05.01, Gifts, Donations, Grants and Endowments*, Texas A&M University-Corpus Christi (TAMU-CC) may accept gifts for the purpose of creating endowed non-faculty positions. This procedure describes the selection, appointment, evaluation, and reappointment of these endowed positions and the related budgetary guidelines. Endowed faculty positions are covered in university procedure *21.05.01.C0.02, Endowed Faculty Positions*.

Procedure

1. GENERAL

    1.1. Endowed non-faculty positions are honorary appointments that acknowledge and recognize distinguished leadership positions and provide a valuable tool to recruit and retain exceptional executive leadership. In all instances, selection criteria for appointments to endowed non-faculty positions, as well as budgetary approvals, will reflect the stated priorities and restrictions established when the position was created. The following general definition and selection criteria will apply to all non-faculty endowed positions.

    1.2. Endowed non-faculty positions should be considered as a high honor and recognition of consistently outstanding performance and ability. The expectation of a distinguished record of performance in the primary performance dimensions of the position must be met in addition to any specific selection criteria associated with a particular endowed position. The appointment to an endowed non-faculty position may recognize a current staff member or it may be associated with recruitment of a new staff member.

    1.3. Naming endowed non-faculty positions shall be directly related to the size of the permanent endowment provided and shall be determined at the discretion of the President. The President will notify the division vice president of any approved endowed non-faculty positions.

2. SELECTION

Upon approval for an endowed non-faculty position by the President, the area supervisor will initiate the selection process for the position. In every instance, this selection process shall include advice and counsel from an appropriate hiring committee appointed or recognized by the supervisor.

3. APPOINTMENT

3.1. Once a candidate has been selected, the supervisor shall initiate a request for appointment which includes sufficient information and justification for review and evaluation by the division vice president or the President for units reporting to the President. Recommendations of the hiring committee and appropriate area supervisor should accompany the request for approval at subsequent steps in the approval process. Appointments require the approval of the President.

3.2. Initial appointments shall be consistent with all applicable university rules and procedures including university procedure *33.99.01.C0.01, Filling Staff Vacancies*. Appointment letters should include specific reference to the appropriate university procedure on evaluation and reappointment and on the management of endowment related funds. While special conditions may be established by mutual consent and with the approval of the division vice president, when applicable, and the President, unusual and extraordinary conditions are discouraged and shall in no case conflict with system policies and regulations or university rules and procedures.

4. EVALUATION AND REAPPOINTMENT

4.1. The supervisor shall evaluate endowed non-faculty positions annually according to the requirements of the original gift that established the position.

4.2. For endowed non-faculty positions with either an annual endowed appointment or in the penultimate year of a multi-year endowed appointment, the following additional evaluation and reappointment requirements apply.

4.2.1. The supervisor will forward the complete evaluation along with their recommendation regarding reappointment to the division vice president or President for units reporting to the President.

4.2.1.1. If applicable, the division vice president will make a recommendation regarding reappointment and forward that along with the complete evaluation and recommendation from the supervisor to the President.

4.2.2. After reviewing the recommendation(s) in light of the endowment purpose and criteria, the President will notify, in writing, the supervisor

and division vice president when applicable, of the final reappointment decision for each endowed non-faculty position under review.

5. BUDGETARY GUIDELINES

5.1. All expenditures of income generated by non-faculty endowments must be in accordance with the original gift agreement, all applicable university rules and procedures, and any affiliated foundations.

5.2. Prior to the beginning of each fiscal year, Institutional Advancement shall designate the amount of funding which will be transferred to an account in the name of the endowed non-faculty position holder. In the case of funds from the Harte Research Support Foundation for HRI positions, all funding decisions are proposed by the Senior Executive Director and approved by the Harte Research Support Foundation in consultation with the university President.

6. REPORTING

6.1. Institutional Advancement will send a report to the donor on the use and impact of the endowment funds on an annual basis. In the case of funds from foundations affiliated with the position, the supervisor shall make that report to the foundation.

6.2. In September following each year where endowed funds are spent on positions, the supervisor will submit a report to Institutional Advancement addressing the following:

a) The amount of endowed funds spent in the previous academic year;

b) What the money was spent on; and

c) The impact of those funds.

7. EXCEPTIONS

Any exceptions to the processes outlined in this procedure require the approval of the President.

Related Statutes, Policies, or Requirements

System Regulation *21.05.01, Gifts, Donations, Grants and Endowments*
University Procedure *21.05.01.C0.02, Endowed Faculty Positions*
University Procedure *33.99.01.C0.01, Filling Staff Vacancies*

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