



# UC San Diego Policy & Procedure Manual

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## PERSONNEL - ACADEMIC

### Section: 230-191 Appendix I

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### Appendix I: UC San Diego Guidelines for Endowed Chair

These guidelines apply to all endowed chairs and chair appointments established after January 1, 2015. Departments are responsible for ensuring appropriate practices related to these commitments and should expect to report annually to their Dean and the Office of Donor and Fund Stewardship on activities related to these chairs.

#### Endowed Chairs

##### A. Gift or Allocation Minimums

General Campus	\$1,000,000
Health Sciences	\$2,000,000
Marin Sciences	\$2,000,000

##### B. Term

- See PPM 230-191.B.2, Chair Definitions

##### C. Annual Payout (N)

- **Chair Holder Allowance                    \$25,000**  
The first \$25,000 of annual payout from the fund will provide a scholarly allowance to be available for expenditure on UC San Diego related uses at the discretion of chair holder [e.g., GCCP or HSCP/Y component, grad or post-doc support, research support, scholarly travel]
- **Balance of Payout                                (N - \$25,000)**  
Any remainder of payout after deduction of the Chair Holder Allowance is to be allocated for use as determined by the appropriate academic Vice Chancellor for some combination of academic year salary support for the chair holder and support for graduate students in the research area of the chair holder.

#### Administrative Chairs

##### A. Gift and Allocation Minimums

Dean/Chairs	\$3,000,000
Vice Chancellors	\$5,000,000

##### B. Annual Payout (N):

- **Chair Holder Allowance                    \$25,000**  
The first \$25,000 may be used at the discretion of the chair holder

- **Remainder of Payout** (N - \$25,000)

Available towards the salary of chairholder.

### **Managing Endowed Chair Payout**

Appointments made to endowed chairs prior to January 1, 2015, have a grandfather provision for existing chair holders. In those cases, all payout will be used for the scholarly activities of the chair holder.

- Legacy endowed chairs will transition to the new payout rules when the chair holder changes if consonant with the chair establishment documents.
- Existing legacy chair holders may transition to the new rules voluntarily at the time of their next scheduled endowed chair review/reappointment.

Commitments to retiring or separating chair holders regarding access to fund balances for a transitional period require prior approval by the Executive Vice Chancellor-Academic Affairs.

- A formal request that includes appropriate justification, amounts, timelines, and impact to filling the chair will be needed.

Decisions to move unspent balances back to principal require the Chancellor's approval.

- A request that includes appropriate justification will be needed.

Access to unspent balances on vacant chairs requires approval from the Executive Vice Chancellor- Academic Affairs and will need to be permitted in the existing donor agreement or additional donor permission will need to be sought.

- A request that includes appropriate justification and the impact to filling the chair will be needed.

Payout balances are to be expended annually. Payout accumulations should not exceed two (2) years.

UC San Diego Advancement Services will request an annual report from chair holders on their use of endowed chair payout balances.

### **REVISION HISTORY**

April 2, 2020	Technical edits to remove gendered language.
January 28, 2025	Revised and replaces 01/01/2018 Attachment I