



School of Medicine
PROFESSORSHIP GUIDELINES

The designation of a named distinguished professorship is the process by which a full-time faculty member is awarded an honorary academic title accompanied by additional salary support and/or research funds. Appointments may be permanent - held through retirement or resignation - or time-limited, depending on the terms of the funding source.

Both tenured and fixed-term faculty are eligible to hold professorships. Appointments may be made at the teaching, research, or clinical ranks, subject to the governing fund authority, and applicable policies.

TYPES OF PROFESSORSHIPS

State-Matched Professorships

The University administers professorships approved for the Distinguished Professors Endowment Trust Fund program (DPETF) created by the North Carolina General Assembly in 1985. These professorship endowments are funded by donor gifts that are matched with state appropriations according to an approved schedule of gift and state-match amounts.

The structure and permissible use of the funds are governed by DPETF program policies, donor fund agreements, and professorship plans. Endowment funds are held in UNC School of Medicine/University accounts. Financial management is a shared responsibility of UNC Associated Entities and Investment Accounting, the UNC School of Medicine Office of Finance and Business Operations, and departmental financial administrators.

UNC Health Foundation Professorships

The UNC Health Foundation, the fundraising arm of the UNC School of Medicine and independent 501(c) (3) organization, establishes professorships through philanthropic gifts from donors and manages associated endowments through the UNC Health Foundation Finance Office. The structure and use of these funds are governed by the donor fund agreements, as well as applicable UNC School of Medicine, UNC Health Foundation, and University policies.

School of Medicine Professorships

The UNC School of Medicine has historically received funds from donor estates and gifts that are not part of the Distinguished Professors Endowment Trust Fund program (DPETF). Many of these endowed funds do not have donor fund agreements or professorship plans due to the age of the funds. These endowments are held in UNC School of Medicine/University accounts. Financial management of the accounts is a shared responsibility of UNC Associated Entities and Investment

Accounting, the UNC School of Medicine Office of Finance and Business Operations, and departmental financial administrators.

University Distinguished Professorships

The University manages several distinguished professorships through the Office of the Executive Vice Chancellor and Provost. Tenured full professors within the UNC School of Medicine may be nominated for the following awards: Kenan Distinguished Professors; William R. Kenan, Jr. Distinguished Professors; Cary C. Boshamer Distinguished Professors; and Alumni Distinguished Professors. Faculty members who currently hold school-based distinguished or term professorships are eligible for nomination. If awarded a University Distinguished Professorship, the faculty member must vacate their existing professorship. For further information:

<https://facultyaffairs.unc.edu/policies-and-procedures/faculty-appointments/distinguished-named-professorships/>

DEFINITIONS

Eminent Professorship

The only endowed professorship that can create and fully fund a new senior faculty position at UNC Chapel-Hill.

- Current funding level to establish new eminent professorships: **\$5 million.**

Distinguished Professorship

An endowed professorship awarded to a full professor for the duration of their full-time service at UNC-Chapel Hill. Distinguished professorships may also be awarded to assistant or associate professors for a renewable, time-limited term.

- Current funding level to establish new distinguished professorships: **\$2 million.**

Term Professorship

An endowed Term Professorship awarded to a faculty member at any rank for a defined period, typically 3-5 years.

- UNC Health Foundation term professorships, including the Sarah Graham Kenan Professorships and the Medical Alumni Distinguished Teaching Professorships, are awarded and managed by the UNC SOM Office of Faculty Affairs.

Permanent and Term Appointments

Distinguished or Eminent professorships awarded at the rank of full professor are permanent appointments for the duration of the faculty member's full-time service at UNC-Chapel Hill. A distinguished professorship awarded at the rank of assistant or associate professor has a time-limited term appointment, typically 3-5 years, which may be renewable per the fund agreement.

Fixed-term faculty may be awarded professorships for a period aligned with their employment dates.

STATE-MATCHED PROFESSORSHIP CONSIDERATIONS

These professorships have received state-appropriated funds and are subject to specific policies governing the use of endowment income. As with all professorships in the School of Medicine, funds should benefit the awardee first and are not intended to cover funding gaps in departments, divisions, or programs, or directed to other faculty, for education programs, or for recruitment packages for new faculty.

Use of Funds

The UNC Policy Manual 600.2.3, Policy on the Distinguished Professors Endowment Trust Fund and Regulation on the Distinguished Professors Endowment Trust Fund 600.2.3(R) are main reference documents and govern use of funds:

“VI.B. Use of Income Earned from Funds. Income from the endowment cannot be used for any purpose other than the support of the endowed professorship.

- 1. Approved uses include, for example: a salary supplement for the holder, travel, research expenses associated with their professional responsibilities, stipends for teaching, research assistants for the distinguished professor, and special equipment or items needed to support the teaching and research of the distinguished professor.*
- 2. No funds shall be drawn from the specific endowment for use when the position is vacant, with the exception of specific recruitment incentives to secure a replacement distinguished professor. Allowable uses for the funds during recruitment/hiring phase are: a sign-on bonus, moving expenses, and lab/research start-up funds (to include equipment purchase, lab renovations, etc.).”*

Reporting on State-Matched Professorships

The UNC School of Medicine and UNC Health Foundation collaborate to provide annual reporting to UNC General Administration on the number and status of professorships including whether each is vacant or filled, the date it was vacant, and the plan to fill the vacancy as quickly as possible. The UNC School of Medicine Dean’s Office in conjunction with the UNC Health Foundation manage questions that arise on the administration of the state-matched professorships.

SCHOOL OF MEDICINE AND UNC HEALTH FOUNDATION CONSIDERATIONS

Use of Funds

UNC Health Foundation donor agreements frequently designate the department chair as fund authority, reflecting their role in nomination and appointment. Once a faculty member is named, spending authority should be delegated to that individual, with appropriate oversight by the Chair or ACA (Associate Chair of Administration). Unless outlined in the fund agreement, it may violate the donor’s intent if the Chair/Chief/Director uses the funds outside of the named recipient without

their permission. The agreement includes uses for the named professor – salary, travel and research expenses and other support for their work.

The Chair, as fund authority, has the ability to direct how funds are used within professorship uses - for example, requiring that a certain portion support the faculty member's salary (i.e., cost share). However, as with state-matched funds, the Chair does not have the authority to redirect funds for other faculty members, for recruitment, for other departmental/ division/program use, or to withhold funds from the named faculty member, as doing so would violate the fund agreement and donor intent.

EXPECTATIONS FOR PROFESSORSHIP HOLDERS

Departments

Professorship titles should be listed first on faculty webpage listings with the full professorship name, on letterhead, and business cards.

Professors and Department Chairs

Funds from the professorship endowments should be used annually to support the faculty member's salary, stipend, research, travel, and other uses to supplement their work and mission as outlined by fund agreements and state-match policy.

Professors with Select Named Professorships

Reporting

Professors holding professorships with stewarded donor contacts are expected to provide a brief annual written impact update describing how the support advances their research, education, and patient care missions. The UNC Health Foundation Donor Relations/Stewardship team will contact the faculty member to participate in reporting annually. This reporting is part of our accountability to donors and helps raise additional philanthropic gifts.

Inaugural Celebration

Newly appointed inaugural professors may be asked to celebrate their appointment at a special event with their family, the professorship donors and department leadership. Events are generally held following official appointment by the Office of the Provost. Details will be provided by the Foundation Development and Special Events teams.

Ongoing Engagement

Named professors may be asked to engage in continuing philanthropy through in person and on-line meetings and correspondence, tours of research laboratories, invitations to special events to speak on your work and engage with potential and current donors.

FREQUENTLY ASKED QUESTIONS

How are professorships established?

Most professorships are created through donor interest and philanthropic funding, typically from a single donor. An endowment is established with a fund agreement and approval from the President/Chief Philanthropy Officer of UNC Health Foundation, and the applicable UNC School of Medicine leadership (Chair, and/or Division Chief, and/or Center/Program Director, and/or Dean, School of Medicine).

Does every professorship endowment have a fund agreement and/or professorship plan?

For older professorships, there may only be a fund authority for reference. All state-matched professorships have both a fund agreement and a professorship plan per the program guidelines. All current UNC Health Foundation professorships have a donor fund agreement detailing donor intention and use of funds. For assistance locating documentation, contact UNC Health Foundation, Donor Relations.

I have personal knowledge of the donor intention for the creation of the professorship fund, does that determine how a professorship may be used?

The donor fund agreement, professorship plan, funding authority, and in the case of state-matched, the DPETF program policies guide the use of a professorship in conjunction with UNC School of Medicine and University policies.

How do I identify professorships within my department or area?

The School of Medicine Dean's Office maintains a comprehensive list that is regularly updated in collaboration with SOM Human Resources and UNC Health Foundation.

In addition to overviews of funds provided by UNC Health Foundation staff as orientation for new chairs with philanthropy staff, each ACA should maintain copies of applicable fund agreements, professorship plans, and state-matched correspondence. For School of Medicine professorships, the SOM Finance Office can provide lists of funds and available spending balances. For UNC Health Foundation Professorships, the UNC Health Finance Office provides parallel information.

How do we know what type of professorship it is?

The fund agreement (or other historical documentation) associated with the professorship specifies the type of professorship.

All "state-matched" professorships must be UNC School of Medicine funds and the fund agreement will refer to the "State of North Carolina's Distinguished Professors Endowment Trust Fund," as well as documentation to and from the Chancellor/Dean of UNC SOM to the UNC System Office regarding the matching funds.

Can a faculty member hold more than one professorship?

No. UNC School of Medicine faculty may hold only one professorship at a time, ensuring these resources are used broadly for recruitment and retention across the School.

Can a new professorship be designated for a department chair, division, or center chief position?

Yes, new professorships can be established for a specific leadership role through the donor fund agreement. The professorship is held only while the individual serves in that role and transfers to the next appointee upon transition.

How long may a faculty member hold a professorship?

Distinguished and Eminent Professorships are intended to be permanent and held by full professors during the faculty's full-time service, until separation or retirement from UNC-Chapel Hill. Full-time service is considered 0.75 to 1.0 FTE. Term Professorships or professorships awarded for a term to Assistant or Associate rank are typically awarded for 3-5 years and may be renewable as stipulated in the fund agreement. Fixed-term faculty would hold the professorship for a term aligned with their appointment length.

What determines the length and renewal of a 3-5 year term?

The Chair along with the assembled full professors of the department need to vote to approve the length of the term. The term needs to match their faculty fixed term appointment. Unless specifically indicated in the fund agreement, at the department/Chair's discretion, the term professorship holder may be renominated for another term, contingent on availability of their internal funding (i.e., for their research portfolio). This renewal should be initiated 6 months before the end of their appointment.

Who should be nominated for a professorship?

Professorships are tools for retaining and recruiting outstanding faculty. For state-matched professorships, faculty are expected to excel in teaching, research, and scholarship. There are considerations and guidelines by type; fund agreements may note expertise in a specific field.

Do recruited faculty receive professorship and access to funds immediately upon hire?

Named Professorships are an important recruiting tool. Use clear language in the professorship offer as part of their recruitment package, "we plan to nominate you for the X Professorship, on approval of the University Board of Trustees, following your appointment." The nomination process for receiving the professorship can take a few months after their arrival, so set realistic expectations for the use of these funds and title change.

How do professorship endowments work?

Endowments typically involve donated funds to support our ongoing work and ensure long-term stability. The principal amount of the endowment is kept intact, while the income generated from investing this principal is used for funding the professorship. New professorship endowments take one year from receipt of full funding to distribute income that can be used by/for the professorship

holder. If an endowment is created and the market value goes below the contributed value, the fund is referred to as “underwater,” meaning no funds can be distributed for use that year. Professorship appointments should be verified by departments in conjunction with the UNC Health Foundation as having a funding source with available funds, before extending offers to recruited faculty or moving nominations forward.

Can professorship income be “reserved” to accrue them over a period of time?

Income from professorship endowments is intended for annual use. Funds should only be reserved for more than one year for a truly special use, for example, toward purchase of major equipment directly supporting the faculty member’s work.

Are all types of professorship holders referred to as “Distinguished?”

For the state-matched professorships for full, tenured professors, the recipient is called “Distinguished Professor.” For an associate professor, the recipient is called “Distinguished Scholar,” and for an assistant professor, the recipient is called “Distinguished Fellow.” For fixed term faculty, the titles would be the same, with the addition of Research, Term Research and Clinical and Term Clinical.

Are all UNC School of Medicine professorships funded at the same level?

No. Endowment sizes vary widely based on age, donor intent, and participation in the state-match program, ranging from under \$500,000 to more than \$3 million.

Are there any professorships waiting for the state-match?

As of 2024, all UNC SOM professorships in the queue to receive the state-match were awarded. The Foundation is not actively adding new ones to be matched, but the UNC SOM may still receive new professorships from estate gifts where the donor requested participation in the program, or if a current donor requests participation.

Who should be contacted for financial questions?

To determine how are funds accessed, available fund balance, projected annual income, People-Soft source codes, and other financial questions:

- For UNC School of Medicine funds, including state-matched – the department’s ACA or the Associate Dean of Finance should be consulted.
- For UNC Health Foundation funds – the Director of Endowment and Investment Accounting should be consulted.

Who do I contact for questions on the nomination process and human resources issues?

The Associate Director of Human Resources, UNC School of Medicine

Who do I contact for questions related to agreements and policies for UNC School of Medicine funds?

The Senior Associate Dean of Administration, UNC School of Medicine

Who do I contact for questions related to fund agreements?

The Senior Director of Stewardship and Donor Relations, UNC Health Foundation

PROFESSORSHIP NOMINATION PROCESS

Nomination

The nomination process includes review and approval by the Dean's Advisory Committee (DAC), the University's Health Sciences Advisory Committee (HSAC), and the Appointment, Promotion, and Tenure (APT) Committee. Conferral of this honor requires approval by the Board of Trustees. Upon approval of the Board of Trustees, the Office of the Provost issues the appointment or reappointment letter for Distinguished Professorships and Distinguished Term Professorships to the faculty member, the department chair or center director, the dean, and the School of Medicine Human Resources Office.

As named professorships bring honor and prestige to the holder and the department or center, the nomination letter should reflect both the individual's accomplishments that merit this recognition and also the future impact of their continued work to further the department or center's mission. This letter should include: specific areas of excellence upon which the appointment is being based (i.e., research, clinical scholarship, educational scholarship); the specific contributions made by the individual to the teaching mission of the School; and, if the individual is a new faculty member, a description of the ways he or she will enhance the department or center's strengths. See the template for the nomination letter.

Procedure Checklist

1. The Department Chair or Center Director should first review the professorship fund agreement and approved state professorship plan to ensure no restrictions exist that would conflict with the potential appointment.
2. The Department Chair or Center Director verifies with the department or center business manager for School of Medicine funds or the UNC Health Foundation Finance Office for Health Foundation funds if the fund will have sufficient endowment income to cover the expected award. Note that if the fund is "under water" (the market value is less than the original donor contribution value), no income will be generated and the department or center should have identified an alternative source of funding for the recipient until the market value is sufficient.
3. The Department or Center should follow its own procedures for recommending current faculty to named professorships, including applicable committee reviews, or if the named professorship is to be filled by an individual outside of the University, the department or center should follow the procedures for hiring tenure-track or fixed term faculty as directed by the School of Medicine Human Resources Office, including the applicable committee reviews and recommendations.

4. Once the candidate has been identified, the Chair or Center Director should work with their department or center HR Consultant to complete the required HR forms. The EHRA faculty representative in the School of Medicine Human Resources Office can advise regarding questions and the necessary HR procedures and forms required. Contact the Associate Director, SOM HR, Faculty and Compensation, or the EHRA Faculty/Non-Faculty Coordinator.
 - * Letter of Justification from Dept Chair/Center Director/Dean
 - * AP-2
 - * Curriculum vitae
 - * Committee Report (if applicable)
5. Once all forms and documents are complete, the originals should be sent to the EHRA Faculty/Non-Faculty Coordinator in the School of Medicine Human Resources Office via Infoporte. The Coordinator routes the materials to the Dean's Advisory Committee for their review and recommendation. The Coordinator then prepares and delivers the application to the Provost's Office for review by the Health Sciences Advisory Committee (HSAC).
6. After the application is reviewed by the HSAC, the paperwork is then submitted to the APT Committee.
7. The APT Committee reviews and submits the application to the Board of Trustees for the University of North Carolina at Chapel Hill for the final step in the approval process. The Board of Trustees votes on the professorship.
8. The Board of Trustees's approval is communicated by letter from the Office of the Provost to the faculty member, the department chair or center director, the dean, and the School of Medicine Human Resources Office.
9. The HR Consultant of the department or center will then generate an action in the system to change the rank/title to accommodate the professorship rank in effect once approved; they also attach the Provost's letter to the action.

Timeline

The Dean's Advisory Committee votes monthly and meets quarterly, and the Board of Trustees meets on a published schedule. The calendar for the Provost Office, HSAC, APT, and BOT is located at the following website: <https://facultyaffairs.unc.edu/policies-and-procedures/apt-schedule/> and the earliest effective date for a professorship is the first day after the BOT meets. Depending on meeting dates, an sample timeline once candidate was identified might be:

Sample Timeline:

DAC Cmte – April 12th

Provost Office – May 2nd

HSAC Cmte – May 20th

APT – June 6th

BOT – June 23rd

Effective date would be June 24th or later

Notification

Once the nomination has been formally approved by the University Board of Trustees, the Department or Center should utilize available communications to notify department or center members of the appointment.

Additionally, the notification should be sent to the Office of Public Affairs & Marketing to publicize on the main School of Medicine website.

Template for a Nomination

Date

Cristy Page, MD, MPH
 Dean, UNC School of Medicine
 CEO, UNC Health
 UNC School of Medicine
 CB# 7000
 8000 Roper Hall
 Chapel Hill, NC 27599

Dear Cristy:

I would like to formally nominate Dr. X to receive the “Name of Distinguished Professorship” in the Department/Center of _____. This professorship was established through gifts from Mr. and Mrs. Kind Donor, *(OR has received a matching grant from the DPETFP or was established in ____)*. (We are appreciative that this Professorship will enable us to retain one of our most productive physician/scientist/teachers). We have dedicated this Professorship to our efforts to recruit an outstanding faculty member of Dr. X’s significant accomplishments and national reputation as an outstanding investigator in the field of X.

Dr. X is an internationally recognized researcher in ____ (accomplishments, clinical trials, awards/grants). He/She has published over X papers, reviews or chapters on his/her very important research on _____. Dr. X serves on these relevant committees (leadership positions on). Dr. X is an outstanding teacher and mentor to our students. He/she has garnered praise for his/her expert care to our patients and clinical scholarship at the School of Medicine and X Hospital. Dr. X is an excellent choice to hold this prestigious professorship.

Dr. X currently serves as Director of ____ and Co-Director of _____. He/She earned his/her undergraduate degree from X and medical degree from X. He/She was a resident at X in X in Year, and then joined the UNC faculty, where he/she has become a national leader and exemplary scholar for our institution. Retention of Dr. X is essential to our research and patient care in X, and vitally important to the area of X. (or Recruitment...)

I believe Dr. X is a highly meritorious candidate for receipt of the “Named Distinguished Professorship and I appreciate your consideration of this request. Upon discussion with _____(tenured faculty members), Dr. X (depending on the number of votes) (1) was supported, strongly supported, or received unanimous support). Please let me know if you need additional information.

Sincerely,

Chair, Department, etc. or
 Director, Center, etc.

Enclosure

cc: