CHAIR/PROF APPOINTMENTS
PROCESS OVERVIEW

STEPS:

Note: Stepping up from a Professorship to a Chair follows a slightly different process but still requires review, ask Hannah for details.

1. Endowment Invested
   1a. Hannah kicks-off appointment process with a memo from Don to Dr. Ramsey

2. Dean initiates search process for holder
   2a. Dean asks department to form a search committee
   2b. Department provides committee names to Dean*
   2c. Dean officially charges the committee
   2d. Committee meets, identifies a candidate and sends their recommendation to the Dean*
*These steps take time and are managed by the department.

3. Dean approves candidate and sends concurrence letter to department chair.
   3a. Office of academic appointments (OAA) prepares materials and routes to DOM financial support services (FSS) to confirm budget and use of funds.*
   3b. DOM Financial Support Services routes the checklist to SOM administration and finance with the budget number(s) and account balances.*
   3c. SOM finance advises OAA on next steps. OAA works with the department to submit the appointment into Workday.*
   3d. Materials are submitted to the Board of Regents (BOR) to get on the agenda of their next meeting.*
*These steps tend to take time and is unfortunately difficult to speed them up – allow one month between the Dean’s approval and the submission deadline for the BOR meeting.

4. Communication of newly appointed holder of the endowment
   4a. Following the Board of Regents meeting, the Provost’s Office sends a letter to the newly appointed holder. An e-copy of the letter is sent to the OAA and Dean Ramsey.
   4b-e. OAA notifies Hannah and she prepares memos and letters for the following:
       > Letter of congrats from PGR to the new holder
       > Letter announcing new holder to donors ($5K and up) Front-Line Fundraisers (FLFs) need to review this letter
       > Memo from Don to the new holder outlining stewardship and thanking
       > Memo from Don to the department suggesting ways to announce the appt. to peers and other constituents.

5. DOM FSS transfers operating account to the benefiting unit (assuming investment is complete).

Other notes:
- Bloedel appointments are managed by central.
- If endowment agreement requires that the holder must be the Chair/Head of Dept./Div., and that position is filled, the committee process is waived – skip to Step 3
- Online meeting schedule, agenda application deadlines, etc: https://www.washington.edu/regents/
- Hannah to notify FLF’s, leadership and donors when an appointment is vacated.