

Five-Year Review Guidelines Endowed/Named Professorships

In 1999, the Council of Deans recommended a five-year review of Endowed Professors to discover whether and how the person holding the appointment is meeting the goals of the Endowed Professorship. Here are the guidelines for the review process.

The Endowed Professor prepares and submits to the Office of Academic Affairs via the Faculty Fellow one electronic copy of a three-part document that includes:

1. The original position description that defined the professorship, letter of agreement or contract with the University;
2. An up-to-date curriculum vita;
3. A **five-page** (maximum) self-study document responding to the relevant items under points I-VI below.

*Please submit all documents electronically to Faculty Fellow,
Michael Allison - allison@umsl.edu*

All documents should be titled as follows:

FYR_Year of review_Endowed__Last name of Professor_Name of document

For example, a CV for Dave Smith's 2020 review would be labeled as:

FYR_2020_Endowed_Smith_CV

The materials prepared and submitted by the professor for the five-year review should reflect the unique nature of each Endowed Professorship.

The self-study document should include the following:

- I. Identify how the goals of the professorship have been met in the past five years. Include, as appropriate, activities which support the UM-St. Louis mission such as:
 - i. Research, external funding, and scholarship;
 - ii. External funding including grants, gifts, and fee for service programs;
 - iii. Teaching and mentoring students;
 - iv. Community partnerships and service; and
 - v. Campus servicePlease include assessment tools and their results used to evaluate these activities.
- II. What annual resources benefit the endowment (funds, space, equipment, scholarships, etc.)? Describe how these resources have been used in the last five years to meet the goals of the endowed position. Please assess the expenditures made and how they improved or increased the value of your work. Append a financial report indicating how endowment funds are spent and used to carry out the mission of the professorship and the wishes of the donor.
- III. Describe your plans for the next five years. Explain how the plans meet the goals of the endowment, the action plan and mission of the University of Missouri – St. Louis, and the strategic plan and mission of the University of Missouri System.
- IV. What recommendations do you have for the professorship and its endowment? In what ways, if any, should the position be rethought or redefined to reflect changes.

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For example, has the knowledge base of your field changed or have changes in the mission of your partner organizations occurred?

- V. Include a review from up to three colleagues from your community partnership(s) who have knowledge and understanding of your work and will submit a written review about how your work meets the goals of the professorship. Have those documents sent to Michael Allison (allison@umsl.edu) by the 5th week of the semester when your self-study is due.
- VI. Address other relevant issues that should be considered during the review process.

The Review Process

The review process includes both a **peer review** and an **administrative review**.

Following submission of the self-study to the Faculty Fellow, the materials will be distributed to the following persons:

- Two UM system reviewers
- The chair of the unit(s) in which the endowed professor holds an appointment,
- The academic leaders of the colleges and centers in which the endowed professor holds appointments or regularly assumes responsibilities,
- Des Lee Collaborative Coordinator & Vice Chancellor for Research (when applicable)
- The Provost

PEER REVIEW

The **peer review** will be completed by the professors appointed by the UM system, in conjunction with the Provost's office. These professors are asked to review the submitted documents and to meet with the colleague who is being reviewed (either in person, over the phone, or using Zoom) to discuss the degree to which the goals of the professorship are being met. The results of the meeting will be summarized in a letter signed by both colleagues (individual letters may be submitted) and submitted electronically to the Provost and Vice Chancellor for Academic Affairs and the Faculty Fellow (allison@umsl.edu).

The letter(s) will address:

- Whether and how the goals of the endowment are being met;
- How the plan proposed for the next five years is consistent with the donor's vision and the campus mission;
- Recommendations and suggestions about the future direction of the professorship;
- Recommendations and suggestions about the review process.

ADMINISTRATIVE REVIEW

The **administrative review** will be completed by those to whom the endowed professor reports and will culminate in a meeting that includes the Provost and Vice Chancellor for Academic Affairs, the endowed professor, the appropriate department chair(s) and Center director(s), Dean(s), and the Faculty Fellow.

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In preparation for the meeting each Dean will submit a letter evaluating the record of the endowed professor to the Faculty Fellow by:

- Reviewing the documents submitted for the review by the Endowed Professor;
- Reviewing the annual reviews submitted to date by the professor;
- Consulting with the department chair(s) of the professor;
- Consulting with the professor's community partners.

Next, copies of the letters from the peer reviewers and the Dean(s) will be sent to the Endowed Professor who is being reviewed. The Endowed Professor may submit a letter in response to the Dean's letter and peer reviews by the end of the 13th week in the semester.

The Provost and Vice Chancellor for Academic Affairs will convene a meeting with the Endowed Professor, Dean of appropriate dept., Dept. Chair, and Faculty Fellow to discuss the review and its recommendations with the Endowed Professor. The conclusions of this meeting will be conveyed in a letter from the Provost and Vice Chancellor for Academic Affairs to the Endowed Professor in which the Provost affirms the continuing appointment of the Endowed Chair or initiates action to modify the terms of the appointment to the Endowed position. The process will typically be completed before the official end of the semester (depending on scheduling and timely submission of documents).

TIMELINE

| Activities | Deadline |
|--|---|
| Self-study & 3 letters from colleagues due to Provost's Office | End of 5 th week of Semester |
| Peer reviews conducted | 6 th -7 th week of Semester |
| Peer review letter(s) due | End of 7 th week of semester |
| Dean's assessment letter due | End of 9 th week of semester |
| Professor's response letter | End of 13 th week of semester |
| Follow-up meeting with Provost and Vice Chancellor for Academic Affairs Marie Mora, Dean of appropriate dept., Dept. Chair, and Faculty Fellow Michael Allison | TBD |

**This timeline can be adjusted as needed completed to accommodate peculiarities in professional calendars. Requests to adjust the review schedule should be sent to Michael Allison.

*Approved December 4, 2003, by the Council of Deans.
Revised January 2005 to reflect changes in the administrative organization in the Office of Academic Affairs.
Revised May 2005 by the Council of Deans.
Revised April 2018 to reflect changes in the administrative organization in the Office of Academic Affairs.
Revised November 2018 to reflect system changes to peer reviews.*