Frequently Asked Questions

UCSF stewardship responsibilities for endowed and distinguished professorships

Why is donor stewardship important?

When donors contribute to a professorship, they are expressing a deep interest in the work of a faculty member or in a specific scientific or clinical field. Donors are passionate about the impact of their philanthropy and look forward to receiving updated information about the causes they support, sometimes even incorporating a reporting requirement into their gift agreements. We describe these activities as stewardship. Communications from faculty members give donors confidence that they invested wisely and their gift is being put to good use.

Will there be an event to celebrate my appointment?

If the donor wishes to be publicly recognized, your designated development officer will coordinate a celebratory event to honor your appointment and recognize the generosity of the donor. You and the donor are encouraged to invite close friends, family, and colleagues to attend. Typically, the event takes place on the UCSF Parnassus campus within three to six months of your appointment and consists of a short speaking program and a catered reception.

When should I start using my title?

You should begin to use your official title immediately after your appointment. Please use the title exactly as worded in the documentation you receive from the dean's office and include it on your business cards, website, stationery, and in any articles about you or your work in UCSF news or outside media.

When should I contact the donor?

We recommend that you work with your development officer to contact and/or meet with the donor. The donor might choose to meet at his or her office or home, over lunch at a restaurant, or at another venue of his or her choice.

What is my role in UCSF's ongoing stewardship efforts?

Partnering with University Development and Alumni Relations to produce a report outlining your current research efforts is the most common stewardship opportunity, and we are delighted to assist you in this process. Biennially, an experienced development writer will consult with you and draft the report on your behalf. Working with your development officer, the writer will discuss the report's content and interview you. In addition, you are encouraged to work with your development officer to arrange an annual face-to-face meeting with the donor.

What information will be included in my biennial report?

The biennial report demonstrates the impact of the donor's support. It describes your most recent work, such as your latest research and outcomes, publications, clinical care, mentoring of graduate students, and any professional recognition you have received. If you know the donor has a particular interest in one aspect of your work, you should be sure to describe this in detail, using donor-friendly terminology. You should always thank the donor in the report for the work their philanthropy has enabled you to do and extend an offer to meet in person if they wish.

How is the biennial report to the donor produced?

The writer will prepare a draft of the report and send it to you for content review. Once the writer receives your edits, the fundraiser will mail the report. If you have published research since your last report, we will reference it in the letter and include a copy as an enclosure.

In what other ways could I steward my donor?

Work with the development officer for your department or division to establish the best approach for donors. Some donors prefer a face-to-face meeting, while others feel a written update is sufficient. In addition to the biennial report, you might consider phone calls, handwritten notes, meetings over meals, emails with key research highlights, invitations to visit your lab, or introductions to students benefitting from the donor's funding. Please involve your development officer in any contact you have with the donor so you can work as a team in planning additional opportunities for engagement.

What if my donor is a foundation or a corporation?

A foundation or a corporation usually will designate a program officer or representative to whom reports should be sent. You should treat these representatives much the same as you would treat an individual donor, inviting them to meet with you once a year and taking advantage of stewardship opportunities. If the program officer or representative at the foundation changes, your development officer will let you know and provide the new contact information.

In what other ways can the development officer help?

Development officers can assist you in scheduling and setting up donor meetings (which development officers often attend), drafting letters, sending brief updates about your work and accomplishments, and suggesting creative stewardship opportunities such as university events, lectures, or group lunches. You should work with your development officer to make sure you don't miss out on chances to steward the donor.

What is my fiduciary responsibility?

When you spend the endowment income your endowed or distinguished professorship provides, you are honoring the donors' intent to make a positive impact in your field. Regular expenditures are the cornerstone of good stewardship, and there are rules and policies governing expenditures of endowment income.

According to the university's Policy on Endowed Chairs and Professorships, income from endowments must be used in accordance with the donor's instructions. Expenditures for purposes other than those set forth in the terms of the gift agreement or as subsequently modified with the donor's consent are not permitted. Only under exceptional circumstances should endowment payout be allowed to accumulate. The chancellor has the authority to step in if needed to ensure that accumulated payout is spent appropriately.

How often is endowment income distributed?

Endowment income is distributed each September and is based on a percentage of endowment earnings as determined by the UC Regents and/or the UCSF Board of Overseers, usually between 4% and 5% of the most recent year-end value. Your department's finance officer can provide specific information on available income from the endowed fund. A portion of endowment income (currently amounting to 6%) is directed to cover infrastructure and operations costs, which helps the university provide the facilities and administrative services associated with gift-funded activities.

Whom should I contact if I have questions?

The development officer for your department or division will be happy to answer any questions or direct you to the appropriate contact person in University Development and Alumni Relations. We are pleased to offer any assistance in your ongoing stewardship efforts, and your partnership is deeply appreciated.

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