

**CHECKLIST for OFFERS OF APPOINTMENT
ACADEMIC DEPARTMENT HEAD
REGULAR APPOINTMENTS**

Last Updated: November 8, 2014

POSITION: _____ **CANDIDATE:** _____

Have the following items been included in the offer letter?

| Included | Not Applicable | TITLE (UNC-GA 300.2.1) |
|----------|-------------------|---|
| | | Primary Title |
| | | Secondary Title(s) |
| Included | Not Applicable | ACADEMIC RANK (POL 05.20.01 and REG 05.20.34) |
| | | Rank (<i>tenured or tenure-track academic rank appointments require advance concurrence of the academic home department head & the home department voting faculty. Non-tenure-track appointments require advance concurrence of academic home department and may require concurrence of the voting faculty, depending on department practices.</i>) |
| | | Tenure Status (<i>granting of tenure is contingent on BOT approval</i>) |
| | | Academic / Tenure Home Department (<i>academic rank appointment requires advance concurrence of departmental voting faculty</i>) |
| | | Secondary or honorary academic appointment (e.g., Lecturer, Adjunct; requires advance concurrence of academic home department head & may require concurrence of home department voting faculty) (UNC-GA 300.1.1) |
| | | Professorships of Distinction (<i>REG 05.20.17</i>) |
| Included | Not Applicable | APPOINTMENT STATUS CONSIDERATIONS |
| | | Whether Full-Time or Part-Time (and corresponding FTE) |
| | | At-will (not contract) and at discretion of the Chancellor (<i>UNC-GA 300.2.1 & POL 05.15.01</i>) |
| | | Whether Fiscal Year (12 mo) or Academic Year (9 mo) appointment |
| | | Start Date |
| | | Reporting Relationship (<i>the position(s) this position reports to</i>) |
| | | Appointing Authority (<i>i.e., "subject to approval by" ... Chancellor (as delegated to the Provost, Vice Chancellors, Deans, Director of Libraries & Director of Athletics) except Director of Athletics (REG 01.20.1)</i>) |
| | | The primary role of an academic department head is administrator with a tenured faculty appointment. The administrator role is considered to be the "controlling appointment" for determining conditions of employment and rights/responsibilities of the employee |

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| Included | Not Applicable | APPOINTMENT CONTINGENCIES (if external hire, this appointment is contingent upon...) |
| | | Verification of employment eligibility / satisfactory background check |
| | | Verification of academic credentials & requirements for official transcript of highest degree granted |
| | | Agreement to abide by laws and policies |
| | | Contingent on funding if paid materially from non-state funds (<i>UNC-GA 300.2.1</i>) |
| Included | Not Applicable | ESSENTIAL JOB EXPECTATIONS |
| | | Position description was provided during recruitment process, or |
| | | Position description is included with this offer letter |
| | | Formal performance evaluation timeframes |
| Included | Not Applicable | SALARY CONSIDERATIONS (UNC-GA 300.2.1) |
| | | Starting salary for this appointment plus administrative salary supplement with total salary clearly stated; represented as an annualized amount |
| | | Provision for periodic review of compensation & when eligible |
| Included | Not Applicable | BASIC BENEFITS CONSIDERATIONS |
| | | Healthcare / Retirement participation |
| | | Annual leave accrual rates (<i>UNC-GA 300.2.1</i>) |
| | | Other base benefits |
| Included | Not Applicable | RELOCATION COST CONSIDERATIONS (see POL 05.15.3: Non-Salary Comp) <i>(EPA employees in other JCAT categories (other than 100s and 200-205) must be authorized by the Board of Trustees)</i> |
| | | Finalist candidate visit (post-offer, pre-acceptance) to see area |
| | | Finalist candidate visit by spouse/partner/family |
| | | New hire visit(s) of candidate to house-hunt |
| | | New hire visit(s) of spouse/partner/family |
| | | Actual costs of moving household (approval by Provost/Vice Chancellor/Dean) |
| | | Subsidy for interim travel / commute expenses (including \$ limit, duration limit) |
| | | Subsidy for interim housing if any (including \$ limit, duration limit) |
| Included | Not Applicable | NON-SALARY COMPENSATION CONSIDERATIONS (see POL 05.15.3) |
| | | Provision of lease/courtesy vehicle |
| | | Provision of vehicle insurance, parking, or related |
| | | Club memberships for conducting university business |
| | | Campus athletic or cultural event season passes, or similar |
| | | Housing provided, if occupancy is required by the University |
| | | Bonuses or other contingent compensation |
| | | All Other, regardless of funding source |
| | | Contingency that non-salary comp is dependent on BOT approval |

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| Included | Not Applicable | POSITION START-UP CONSIDERATIONS |
| | | Office space / lab space |
| | | Staff support / grad student support provided |
| | | Resource commitments beyond the department's current operating budget |
| | | Other start-up resource commitments |
| Included | Not Applicable | ADMINISTRATIVE SEPARATION FROM THIS APPOINTMENT IF INDIVIDUAL ALSO HOLDS FACULTY RANK / TENURE |
| | | Salary/Compensation upon administrative separation (administrative stipend removed and immediate adjustment to 9- or 12-mo salary of comparable faculty, per UNC policy and per NCSU policy 05.15.01 sec 3.1.2) |
| | | |
| Included | Not Applicable | OTHER |
| | | Notice that employment is subject to, and attach, UNC Policy 300.2.1 (https://www.northcarolina.edu/policy/index.php?tag=300.2.1) |
| | | Instruction to sign, date, return original, keep copy for self – accepting offer |
| | | Signature & Date Line for notification of acceptance by candidate |
| | | Signed by Dean |
| | | CC: BOT Chair (<i>if tenure is requested</i>) |
| | | CC: Provost & Executive Vice Chancellor |
| | | CC: "Home" Dean of regular Faculty position, if any |
| | | CC: Dept Head of "Honorary / Nominal" faculty appointment, if any, and if different than "Home" department |
| | | CC: Human Resources Central Personnel File |
| <i>Recommended best practice: Have the following institutional officials reviewed & endorsed the draft letter before it is issued?</i> | | |
| | | College/Division Finance/HR LEAD |
| | | Human Resource EPA Administration |
| <i>Is a subsequent letter needed, to notify individual of BOT approval?</i> | | |
| YES | NO | Tenure Granted |
| YES | NO | Approval of Non-Salary compensation components of appointment that require BOT approval on a case-by-case basis |
| | | Formal approval letter (post-BOT) -- DATE SENT: |