

Offer Planning Document - Instructions

There are 2 versions of the Offer Planning Document. For Clinical Faculty, please use the Clinical Faculty Planning Document. For all other faculty, please use the Offer Planning Document.

These instructions are for non-clinical faculty.

Planning – Left Side

When planning for a new faculty hire begin on the left side of the form (Recruitment Plan)

Estimate any funding that will be part of the offer, by funding source.

Example: Salary split between the Department and the Division of Research, Start-Up package from the Provost and moving allowance from the Dean.

RECRUITMENT PLAN: Estimate the \$ Amount by Funding Source (this does not mean the chart string)							
Expense	Fiscal Year	Dept, \$ Amt	College, \$ Amt	VP Research \$	Provost \$	*Other \$	TOTAL
Salary:	2020	\$70,000.00		\$70,000.00			\$140,000.00
Start-Up - Equipment (1):	FY20				\$25,000.00		\$25,000.00
	FY21				\$25,000.00		\$25,000.00
	FY22				\$25,000.00		\$25,000.00
Start-Up - Renovation/Construction		\$0.00					\$0.00
Other Start Up Costs	FY20				\$100,000.00		\$100,000.00
	FYXX						\$0.00
	FYXX						\$0.00
							\$0.00
Moving:			\$10,000.00				\$10,000.00
							\$0.00
Travel:							\$0.00
							\$0.00
Other Reimbursements (**please describe below):		\$5,000.00					\$5,000.00
Total Requested Commitments:		\$75,000.00	\$10,000.00	\$70,000.00	\$175,000.00	\$0.00	\$330,000.00

Make sure that the owner of each funding source has agreed to provide the requested funding before moving forward.

Identify any additional sources of funding that are listed in the Other column.

*Identify Other Column Funding Source and Approver:	
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Obtain proposed chart strings for the funding. Please note, chart strings may change before the final offer.

Obtain signatures (on the left side) for any department that is providing funding. The Department Chair and Dean must signoff.

If the department is requesting funding from the Office of the Provost, the document must be sent to the Chief of Staff, Office of the Provost to initial before it is sent to the Provost for signature.

Post the position and begin searching for our new faculty member.

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Offer – Right Side

When the new faculty member is identified, negotiate the final offer amounts. The dollar amounts in the recruitment plan should be the maximum offered.

Once the final offer amounts are agreed to, fill out the Offer Information (Right Side) of the OPD.

Offer Information

Candidate Name:	Fred Johnson, PhD.
Payroll Start Date:	09/01/2019
Offered Position Rank:	Professor
Tenure Requested upon hire (Y/N):	No

OFFER LETTER APPROVAL: Funding Source (College, Provost, etc.)

Dept, \$ Amt	College, \$ Amt	VP Research \$	Provost \$	*Other \$	TOTAL
\$68,500.00		\$63,250.00			\$131,750.00
			\$10,000.00		\$10,000.00
			\$10,000.00		\$10,000.00
			\$1,000.00		\$1,000.00
					\$0.00
			\$100,000.00		\$100,000.00
					\$0.00
					\$0.00
					\$0.00
	\$5,000.00				\$5,000.00
					\$0.00
					\$0.00
					\$0.00
					\$0.00
\$68,500.00	\$5,000.00	\$63,250.00	\$121,000.00	\$0.00	\$257,750.00

Please complete the Start-Up Detail tab for any candidates that are receiving a Start-Up package greater than \$100k

Verify the chart strings for all funding sources.

Obtain signatures on the right side for any department that is providing funding. If the office of the Provost is committing funding, the document must be sent to the Chief of Staff, Office of the Provost to initial before it is sent to the Provost for signature.

Include the fully signed OPD in the hiring ePar.