

University Employment Bonus Program Form

Use this form for all items covered by [POL# 05.60.02](#), University Employment Bonus Program

Requestor Information:

Name		Job Title	
College/Division		Department	
Phone Number		E-mail Address	
Date of Request			

Employee Information (as applicable):

Name:	Employee ID:
Employee Title:	<input type="checkbox"/> EHRA <input type="checkbox"/> SHRA Position Number:

- Sign-On Bonus: [EHRA or SHRA]**
- For a specific job classification
 - For an individual position

- Retention Bonus: [EHRA or SHRA]**
- In parallel with a Sign-On Bonus Program for a specific job classification
 - In parallel with a Sign-On Bonus Program for an individual
 - For an individual

Referral Bonus [SHRA]

Department Head Approval

Print Name: _____ Signature: _____ Date: _____

Dean and Provost / Vice Chancellor Approval

Print Name: _____ Signature: _____ Date: _____

Chancellor Approval (if Board of Trustees approval is NOT required)

Print Name: _____ Signature: _____ Date: _____

Chancellor Recommendation (Board of Trustees approval IS required for SAAO)

Signature: _____ Date: _____

OHR USE ONLY (notes)	Board of Trustees Action <input type="checkbox"/> Approved <input type="checkbox"/> Denied Date: _____
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SIGN-ON BONUS

Situation 1: For a specific job classification

Provided to attract qualified candidates in job classifications critical to the mission of an institution that have labor market shortages impacting the business needs of the institution and impairing the delivery of essential services. To enhance its ability to recruit during labor market shortages, an institution may determine the need to offer competitive sign-on bonuses to candidates hired into positions for a specific job classification within the institution, division, facility, or unit. The sign-on bonus may also be limited to a geographical area.

Situation 2: For an individual position

Provided to attract qualified candidates in a position that is critical to the mission of an institution in which the market is very competitive. Typically, the employee in the position will serve as the only individual in a role or will be one of two within an institution. Typically, a bonus would be used in this situation when an institution's inability to attract and hire a strong candidate would impact the business needs of the institution and impair the delivery of essential services.

PAY EQUITY

Is a potential equity issue created?

- YES** – Complete your response below
- NO** – Proceed to the applicable bonus program form

If "Yes," complete this question:

If a potential equity issue is created, the university's proposed bonus must also contain a written plan approved by the University's EEO officer [Assistant Vice Chancellor for Human Resources] that addresses how the university will adjust similarly situated employees when funding becomes available to address equity. Include this written plan below or acknowledge the creation of a plan below and attach, as applicable.

Are departmental funds available to support the requested bonus, and the office of financial planning and analysis has approved funding.

- YES** – insert fund number
- NO** – describe the plan to secure funding to support this request

SIGN-ON BONUS
For a specific job classification

How long will the sign-on bonus be available?	
What will be the amount of the sign-on bonus?	
How will the payment be distributed? <i>(One lump sum or installments, if installments how many and over what time period, not to exceed 12 months)</i>	
What is the position classification/job title and level?	

I certify the sign-on bonus must be awarded at a flat rate for the job classification.

Yes

I certify that the sign-on bonus must be consistently applied to all new hires in the classification.

Yes

Please check one or more of the following reasons for requesting the bonus.

- Turnover rates are significantly higher than acceptable.
- Retention rates are significantly lower than acceptable.
- Vacancy rates are significantly higher than acceptable.

Explain in detail and/or attach supporting data (e.g.: quality of applicant pools, # of failed searches, declined offers, etc.)

Explain the steps taken to mitigate the recruitment or retention challenges (e.g.: targeted advertising, etc.)

Is the university seeking to provide a sign-on or retention bonus payout for a group of fifty (50) or more employees?

- YES** – The University must obtain advance approval from OSBM to confirm funds availability.
The office of Human Resources will submit documentation to UNC System Office Human Resources for routing to OSBM.
- NO** – No advance approval from OSBM is required.



SIGN-ON BONUS
For an Individual position

Table with 2 columns: Question and Answer. Questions include: 'What will be the amount of the sign-on bonus?', 'How will the payment be distributed?', and 'Will the sign-on bonus be limited to a specific geographical area?'

Complete the following.

Table with 5 columns: First Name, Last Name, Employee ID, Position #, Job Title

Describe in detail the reason the bonus is requested.

Large empty rectangular box for describing the reason for the bonus.

Attach an explanation for, or state below, why sign-on bonuses are recognized as a common practice to be competitive in the market for the position being recruited.

Large empty rectangular box for explaining the market competitiveness.

Explain the steps taken to mitigate the recruitment or retention challenges (e.g.: targeted advertising, etc.).

Large empty rectangular box for explaining recruitment/retention mitigation steps.



RETENTION BONUS

- In parallel with a Sign-On Bonus Program for a specific job classification
- In parallel with a Sign-On Bonus Program for an employee
- Employee retention only

What will be the amount of the retention bonus?	
How will the payment be distributed? <i>(for example, in the 1st & 12th paycheck)</i>	

What sign-on bonus program is it matching? <i>(Attach the supporting documentation for that sign-on bonus program, if it is not discussed on the previous pages of this form.)</i>	
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Will the retention bonus amount be greater than the sign-on bonus amount?

- Yes – explain below
- No

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Is the university seeking to provide a sign-on or retention bonus payout for a group of 50 or more employees?

- Yes
- No

Complete the following or, for requests with multiple employees, please attach an Excel spreadsheet with the following columns completed.

First Name	Last Name	PER#	Position #	State Job Classification Title

Explain the steps being taken to mitigate the recruitment or retention challenges.

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