

REQUESTOR INFORMATION

Requestor Name		Requestor Job Title	
Requestor Division		Requestor Department	
Requestor Phone Number		Requestor Email Address	
Date of Request			

TYPE OF SIGN-ON BONUS REQUESTED

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. And, 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 your answer to the equity question was "Yes," complete this question:

If a potential equity issue is created, the institution's proposed bonus must also contain a written plan approved by the Institution's HR Director that addresses how the institution 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?

- YES** – provide fund number
- NO** - describe how you will secure funding to support this request.

**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 specific geographical area.

Answer the following questions.

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 understand that the sign-on bonus must be established at a flat rate for the job classification.

Yes

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

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

Is the institution 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. Human Resources will submit documents to UNC System Office Human Resources for routing to OSBM.
- NO** – No advance approval from OSBM is required.

**SIGN-ON BONUS
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. And, 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.

Answer the following questions.

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>	
Will the sign-on bonus be limited to a specific geographical area?	

Complete the following.

First Name	Last Name	Employee ID	Position #	Job Title

Briefly explain below why the bonus is requested.

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

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