Welcome & Introductions

Rocco Luiere
Assistant Vice Provost for Budget and Strategy

Anna Shamble
Senior Project Manager

Sierra Dawson
Assistant Vice Provost for Academic Affairs
Objectives

Participants will be able to...

1. Explain why the term sheet is needed, and how it aids in two-way communication.

2. Describe how the term sheet and offer letter fits into the TTF hiring process.

3. Input new TTF hire data into the tool to produce accurate contingent offer letters.

These slides will be posted online: https://academicaffairs.uoregon.edu/workshops
At your tables…

Please introduce yourself:

- Name
- Unit
- Role
- Number of years in role
Quick definitions:

Term Sheet
Offer Summary
Offer Letter
Addendum
**What is a term sheet?**

### UNIVERSITY OF OREGON
**INPUT TO GENERATE OFFER SUMMARY & OFFER LETTER**

**DO NOT PRINT, DO NOT SHARE WITH CANDIDATE**

<table>
<thead>
<tr>
<th>Key:</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Blue Cells indicate fields for data entry</td>
<td>Green Italic Text is instructional text</td>
</tr>
<tr>
<td>Grey Cells with Grey Text are automatically generated fields</td>
<td></td>
</tr>
</tbody>
</table>

### SEARCH INFORMATION

<table>
<thead>
<tr>
<th>IHP Number</th>
<th>AY17-DESIGN-01</th>
</tr>
</thead>
<tbody>
<tr>
<td>MyTrack Requisition #</td>
<td>520587</td>
</tr>
<tr>
<td>Search Chair</td>
<td>Jamie Harper</td>
</tr>
<tr>
<td>Joint Appointment</td>
<td>Yes</td>
</tr>
</tbody>
</table>

**Must include Joint Appointment addendum with workload, tenure information**

<table>
<thead>
<tr>
<th>School/College</th>
<th>College of Design</th>
<th>College of Arts &amp; Sciences</th>
</tr>
</thead>
<tbody>
<tr>
<td>Department</td>
<td>History of Art and Architecture</td>
<td>Art and technology</td>
</tr>
</tbody>
</table>

### CANDIDATE INFORMATION

<table>
<thead>
<tr>
<th>Vandelet Last</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Email (Permanent)</td>
<td><a href="mailto:avandalet@yahoo.com">avandalet@yahoo.com</a></td>
</tr>
<tr>
<td>Phone</td>
<td>(555) 555-5555</td>
</tr>
<tr>
<td>ADDRESS: Street</td>
<td>122 South Main Street, Apartment 19</td>
</tr>
<tr>
<td>POSTAL ADDRESS:</td>
<td>New York, NY 12222</td>
</tr>
</tbody>
</table>
Arthur Vandelet
122 South Main Street, Apartment 19
New York, NY 12222

This letter is to inform you of my recommendation to the Provost that you officially be offered a position as a tenure-track Assistant Professor with a primary appointment in the Department of the History of Art and Architecture in the College of Design, and a secondary appointment in the College of Arts & Sciences, at the University of Oregon. The following is an informational summary of the details we have discussed regarding this position.

CLASSIFICATION, RANK, AND AFFILIATIONS
• The proposed appointment will be classified as tenure-track Assistant.
• The proposed appointment will be at the rank of Assistant Professor.
• The Institute for Sustainable Environment is also pleased to welcome you as a member of their research faculty.

APPOINTMENT, SALARY, AND BENEFITS
• Your appointment will commence on 9/16/2020.
• The annual academic nine-month base salary for your position is $72,500.
• You will also receive the university’s standard benefits package, including a choice of health, dental, vision, and retirement plans.
What is an offer letter?

November 30, 2017

Arthur Vandelet
122 South Main Street, Apartment 19
New York, NY 12222

Dear Arthur,

We are delighted to offer you a position as a tenure-track Assistant Professor with a primary appointment in the Advertising Program in the College of Design, and a secondary appointment in the College of Arts & Sciences, at the University of Oregon (UO). Given your research interests, profile, and trajectory, we will also officially recognize your appointment as part of the university's Presidential Initiative in Data Science. This offer letter summarizes the previously discussed details of the appointment.

Should you accept this contingent offer and subject to the conditions outlined below, your appointment will carry a full-time, 9-month academic year base salary of $72,500. You will also receive the university’s standard benefits package, including a choice of health, dental, vision, and retirement plans, which are described on the Human Resources website: http://benefits.uoregon.edu/. If you have questions that are not addressed on this website, we can put you in touch with someone who can answer them for you. Your employment with the university will be governed by the rules and policies described in the enclosed Policies, Procedures, and Agreements Addendum. Please note that this letter is only meant to provide a brief, general overview of your employment with the UO. If you have specific concerns, please review the enclosed addendum.

Thank you for your interest in the University of Oregon. We look forward to the possibility of welcoming you to our community.

Sincerely,

[Signature]

[Name]
[Title]

University of Oregon
What is an addendum?

Policies, Procedures, and Agreements Addendum

Policies and procedures governing your employment:

Your employment is governed by the University of Oregon’s policies, to the extent applicable, school or college policies and procedures, and any amendments to the governing policies, agreements, processes and rules. Your employment may also be governed by the United Academics collective bargaining agreement (CBA). To determine whether your position is subject to the CBA, please review Article 1 of the CBA or contact the labor relations department (Nancy Resnick, Chief Human Resources Officer, 541-346-2787) or the president of the United Academics (President 541-346-2987) nresneck@uoregon.edu. In the event that your position is subject to the CBA, policies and the CBA and your offer letter or other verbal or written communication from the university’s policies and the CBA are controlling.

Please note that all employees, including faculty members, are subject to the university’s reassignment policy, which gives the university the discretion to reassign you to meet its administrative need. This means that you could be reassigned to another geographic location, office space, or unit.

Contracts issued prior to UO’s receipt of documentation of your required/terminal degree will be issued as one-year fixed-term acting assistant contracts. If documentation of your degree is received before the expiration of your initial one-year contract, that contract will be revised to a three-year assistant contract, effective as of your start date.

Links to relevant policies, procedures and resources:

Terms and conditions of employment:

1) University policy library; 2) UA Collective Bargaining Agreement; and

Welcome to Our Department!

We are particularly excited about your scholarship in _____________

Why we’re special

Exciting and unique things we offer

We are delighted that you will be joining us
Why are offer letter term sheets needed?

What problem is this new system addressing?
The following clauses are based on actual TTF offer letters.

What problems do you see?
Your normal full time teaching load is five courses per year. Your teaching responsibilities will include internship and at least two undergraduate offerings per year. The other courses you will teach will be determined in consultation with you and the Program Director.

We acknowledge that you will lead a program for [another institution] in Hamburg in the fall of 2013, and may continue to provide teaching for that program in the future, until it is feasible for you to establish a Hamburg program at UO.

In order to ensure that you will have continuous medical insurance coverage, you will receive a paid appointment from August 31, 2012 through September 14, 2012. This paid appointment will not affect your tenure clock, as your official faculty contract will commence on September 15, 2012.

The initial appointment will be for three years, beginning August 1, 2008. As with all faculty members, you will be reviewed at the end of your three-year initial appointment for continuation. At the end of 6.0 FTE years, a tenure decision will be required.
Rationale

Natural extension of the Institutional Hiring Plan (IHP)

Thirty-year commitments require documentation of what we are committing to.

Avoid violating CBA, UO Policy or state law.

Avoid making promises we can not keep.
Where does the offer letter term sheet fit in the hiring process?

Starting with the big picture
The Big Picture (Part 1)

- Search is approved by Provost via IHP process
- OPAA and Unit launch search in MyTrack
- Unit conducts search – applications, interviews, etc
- Unit/Dean identify and approve finalist
- Unit/Dean negotiate elements of offer with finalist using **TERM SHEET, OFFER SUMMARY** (Dean will coordinate with VPRI/OPAA where appropriate)
- Unit emails final **TERM SHEET**, any **ADDENDA** to Dean for approval
- Dean emails **TERM SHEET, ADDENDA** to OPAA for approval and processing
The Big Picture (Part 2)

• OPAA compares terms to search expectations; follow up if needed
• OPAA generates pdf “offer package” (contingent OFFER LETTER and any ADDENDA); emails to Dean
• Dean signs and sends offer package to finalist
• If accepts, Dean emails signed offer package to OPAA, VPRI (if appropriate)
  • If search was conducted outside MyTrack (e.g. AJO), Unit also submits candidate application materials to HR
• OPAA emails signed offer package to HR
• HR completes MyTrack offer card, issues final notice of appointment online to finalist
Take 2 minutes at your tables to generate questions that either you or your table mates have at this point.
Time to use the tool!

Please enter the terms of our example hire into the Term Sheet
Tour of the tool
Now an example that you have brought with you

Enter the terms of a recent hire into the Term Sheet
Additional Questions?

Info coming soon to https://academicaffairs.uoregon.edu/

Anna Shamble
ashamble@uoregon.edu  x3436

Rocco Luiere
rocco@uoregon.edu  x8893