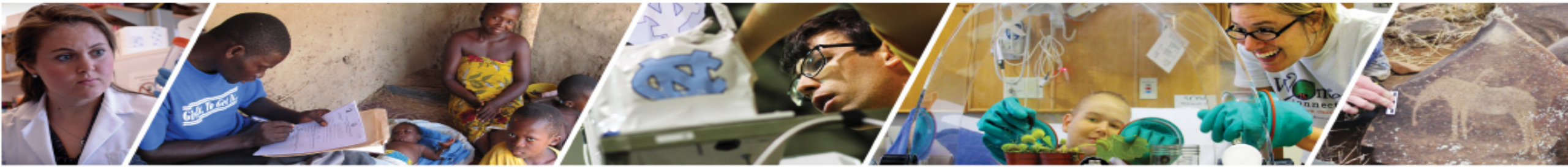


Startup From A to Z

College of Arts & Sciences Startup Reallocation Process

Department Manager's Lunch & Learn



January 27, 2020



UNC
COLLEGE OF
ARTS & SCIENCES

What is Startup?

Incentive offered to prospective faculty in hopes that they will seek employment at UNC

Negotiated between the prospective faculty member, the department chair, and the appropriate Senior Associate Dean

Start-up packages are used to cover the following expenses:

- Research expenses
- Equipment
- Laboratory renovation
- Graduate student or postdoc support (mainly in the sciences to bridge funding from grants)
- Moving

Moving Expenses

Moving expenses are included in each start-up package; Amounts are dependent upon rank:

- ▣ Assistant Professor: \$3,000 – \$5,000
- ▣ Associate Professor: \$5,000 – \$7,000
- ▣ Full Professor: \$7,000 – \$10,000



*Please keep in mind that faculty members are taxed on moving expenses. Reimbursements can be increased by 30% to help defray tax burden; however, the total amount reimbursed cannot exceed the amount specified in the offer letter.

How is Startup Funded?

Funds are generally limited & allocated only as absolutely necessary to make a successful hire.

Start-up is typically split between the department & the Dean's Office using a matrix.

Funds are allocated over a three year period.

Start-up packages in excess of 50K do not carryover!

- These faculty will need to participate in the reallocation process if residual balances are anticipated at year end.
- **SSGP/FAHM-** Work with your budget analyst upon hire to decide the best way for funds to be allocated. (see memo dated 1/23/20 re: Changes to Start-up allocations)

Determining your portion...

Natural Sciences

Allocation Steps- NS		
Start-up Amount	Dept	Dean's Office
First \$10K	100%	0%
>\$10K	20%	80%

Steps:

1. =10,000 **Dept**
2. $(\text{Total startup} - 10,000) * .20$ **Dept**
3. $(\text{Totals startup} - 10,000) * .80$ **DO**

Fine Arts & Humanities/Social Sciences

Allocation Steps - FAHM & SSGP		
Start-up Amount	Dept	Dean's Office
First \$2K	0%	100%
>\$2K - <\$10K	50%	50%
>\$10K - <\$300K	25%	75%

Steps:

1. =2,000 **DO**
2. =0 **Dept**
3. $=(10,000 - 2,000) * .50$ **DO & Dept**
4. $=(\text{Total startup} - 10,000) * .75$ **DO**
5. $=(\text{Total startup} - 10,000) * .25$ **Dept**

Steps to completing the New Faculty Start-up Spreadsheet

New Faculty Start-up Budget Details				
Name:	Bob Evans			
Department:	Marine Sciences			
Hire Date:	7/1/2020			
Comm#	XXXX			
Directions: Please add information into yellow shaded cells only.				
Allocation By Expenditure Type				
Description	19/20	20/21	21/22	Total
Summer Salary	16,667	16,618	-	33,285
Benefits (approx 30%)	5,000	4,985	-	9,986
Grad Students	34,000	51,000	-	85,000
Benefits (approx 15-20%)	5,780	8,670	-	14,450
Tuition & Fees (\$12,516/student)	25,032	37,548	-	62,580
Post Doc	-	-	-	-
Benefits (approx 12%)	-	-	-	-
Subtotal - Personnel	86,479	118,821	-	205,301
Equipment	-	-	-	-
Moving	5,000	-	-	5,000
Renovation	-	-	-	-
Other: Research	-	16,350	16,349	32,699
Professional Travel	17,000	15,000	75,000	107,000
Subtotal - Nonpersonnel	22,000	31,350	91,349	144,699
Total	108,479	150,171	91,349	350,000
Allocation by Funding Source				
Department	19/20	20/21	21/22	Total
Department	26,000	26,000	26,000	78,000
Dean's Office	46,667	72,968	65,349	184,984
Grad School/Fringe Pool/Other External	35,812	51,203	-	87,016
Total	108,479	150,171	91,349	350,000

Only fill in the yellow cells, there are formulas in the white cells

Total amounts need to match

1. Your budget analyst will fill in the Name, Department, Hire Date, Commitment # & Program Code.
2. Start by completing the Startup Calculator by entering the negotiated startup amount into the calculator.
3. If a startup spreadsheet was not completed prior to the hire, work with the Faculty to break up the total startup amount between three fiscal years.
4. Additional calculators have been added! See summer salary, Grad Student & Post-doc calculators, if applicable.
5. For startups in excess of 50K, the subtotals for 'Personnel' & 'Non-Personnel' will calculate to the total allocation the faculty will receive for that year.
6. The 'Allocation by Expenditure Type' & 'Allocation by Funding Source' sections need to match in total.
7. The department's coverage will offset the Dean's Office amounts for that year.
8. The department's coverage will reduce the amount of personnel or non-personnel budget the Dean's Office will allocate.
9. The total Department & Dean's Office coverage should equal the amounts that were initially negotiated.

Start-up Reallocation

Eligibility:

- Changes are allowable during year one and two.
 - For faculty with start-up packages longer than three years, you may request changes in all but the final year.
 - Only current year and future years are eligible for reallocation updates. Past years are not eligible for updates.

How to Submit Changes:

- Update the start-up spreadsheet and email it to your Budget Analyst by February 14th.
 - Fine Arts & Humanities: Kristen Rogister (krsmith3@email.unc.edu)
 - Social Sciences: Heather Yousef (hyousef@unc.edu)
 - Natural Sciences: Lindsay Gangl (lmgangl@unc.edu)



Start-up Reallocation Timeline

Deadline for
reallocation sent

- January 23rd

Current year
reallocations
distributed

- February Budget Load

Reallocation
spreadsheets due
to BA

- **February 14th**

Next year
allocations
distributed

- End of July

For more information on Startup
Packages, please visit the
Chair's Manual:

<https://casbo.web.unc.edu/chairs-manual/>

Please share your
departmental Tips &
Tricks!