EPA Personnel Administration Workshop

Online Training

The University of North Carolina – General Administration
University of North Carolina
Positions Exempt from the State Personnel Act

Senior Academic and Administrative Officers (SAAO)
Human Resources Advisory Board for EPA Employees

<table>
<thead>
<tr>
<th>Name</th>
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<tbody>
<tr>
<td>Ann Lemmon</td>
<td>UNC-GA</td>
</tr>
<tr>
<td>Alan Boyette</td>
<td>UNCG</td>
</tr>
<tr>
<td>Pamela Bowling</td>
<td>OSP</td>
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<tr>
<td>Matt Brody</td>
<td>UNC-CH</td>
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<tr>
<td>Ramah Carle</td>
<td>UNCC</td>
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<tr>
<td>Barbara Carroll</td>
<td>NCSU</td>
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<tr>
<td>Cory Causby</td>
<td>WCU</td>
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<tr>
<td>Gayle Davis</td>
<td>UNC-GA</td>
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<tr>
<td>Linda McAbee</td>
<td>NCAT</td>
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<td>John Toller</td>
<td>ECU</td>
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## University of North Carolina

Positions Exempt from the State Personnel Act

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<tr>
<td>I. Instructional and research staff of the University of North Carolina [N.C.G.S. 126-5(c1)(8)]</td>
<td>Office of State Personnel</td>
<td>Approval not required for positions having academic rank. Other instructional and research positions are submitted using an EPA Designation Request, Form 01, and evaluated according to definitions in the OSP-UNC Agreement. (Exceptions currently exist for NCSU, UNC-CH, and UNCG)</td>
</tr>
<tr>
<td>II. Physicians and dentists of the University of North Carolina [N.C.G.S. 126-5(c1)(8)]</td>
<td>Office of State Personnel</td>
<td>Approval not required for physician and dentist positions requiring professional licensure.</td>
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The University of North Carolina – General Administration
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<td>III. Employees whose salaries are fixed under the authority vested in the Board of Governors of the University of North Carolina by the provisions of G.S. 116-11(4), 116-11(5), and 116-14 [N.C.G.S. 126-5(c1)(9)]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>A. The president, senior vice president, vice presidents, and professional members of the president’s staff [N.C.G.S. 116-14 (b)]</td>
<td>Board of Governors</td>
<td>Request for EPA Action, Form 102, is used to establish new EPA positions in UNC General Administration.</td>
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<tr>
<td>B. Chancellors [N.C.G.S. 116-11(4)] and vice chancellors [N.C.G.S. 116-11(5)]</td>
<td>Board of Governors</td>
<td>Requests to establish new vice chancellor positions are submitted to the senior vice president for BOG approval.</td>
</tr>
<tr>
<td>C. Persons having permanent tenure [N.C.G.S. 116-11(5)]</td>
<td>Institutional Board of Trustees</td>
<td>Approval not required to establish a tenure-track faculty position. Requests to confer tenure: Special Responsibility Constituent Institutions with management flexibility submit tenure recommendations to the respective BOT; institutions without management flexibility submit tenure recommendations on a Personnel Action Form to the senior vice president for BOG approval.</td>
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<tr>
<td>D. Senior academic and administrative officers [N.C.G.S. 116-11(5)]</td>
<td>Defined by the BOG in policy, as indicated below</td>
<td></td>
</tr>
<tr>
<td>1. Vice chancellors, provosts, deans [UNC Policy 300.1.1-I.A]</td>
<td>Board of Governors</td>
<td>Requests to establish new positions are submitted to the senior vice president for BOG approval.</td>
</tr>
<tr>
<td>2. Directors of major administrative, educational, research, and public service activities [UNC Policy 300.1.1-I.A]</td>
<td>Delegated by BOG to UNC President</td>
<td>Requests to establish new positions are submitted using an EPA Designation Request, Form 01, and are evaluated by the HRAB-EPA, which makes a recommendation to the President.</td>
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<tr>
<td>3. Associate and assistant vice chancellors and associate and assistant deans</td>
<td>Delegated by BOG to UNC President</td>
<td>Approval not required to establish new positions.</td>
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<tr>
<td>[UNC Policy 300.1.1-I.B]</td>
<td></td>
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<tr>
<td>4. Specific other officers of the University having significant administrative</td>
<td>Further clarified by the BOG in policy as indicated below</td>
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<td>responsibilities and duties, as may be designated by the President[1]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>[UNC Policy 300.1.1-I.B]</td>
<td></td>
<td></td>
</tr>
<tr>
<td>a. Members of chancellor’s professional staff [UNC Policy 300.1.1-I.B]</td>
<td>Delegated by BOG to UNC President</td>
<td>Requests to establish new positions are submitted using an EPA Designation Request, Form 01, and are evaluated by the HRAB-EPA, which makes a recommendation to the President.</td>
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<tr>
<td>3. Associate and assistant vice chancellors and associate and assistant deans [UNC Policy 300.1.1-I.B]</td>
<td>Delegated by BOG to UNC President</td>
<td>Approval not required to establish new positions.</td>
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<td>4. Specific other officers of the University having significant administrative responsibilities and duties, as may be designated by the President[1] [UNC Policy 300.1.1-I.B]</td>
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<td>a. Members of chancellor’s professional staff [UNC Policy 300.1.1-I.B]</td>
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<tr>
<td>b. Positions responsible for administrative direction of separately designated divisions or departments commonly associated with institutions of higher education [UNC Policy 300.1.1-LB]</td>
<td>Delegated by BOG to UNC President</td>
<td>Approval not required to establish positions that match the descriptions of those on the list of approved generic SAAO positions. Those positions not on the list are submitted using an EPA Designation Request, Form 01, and are evaluated by the HRAB-EPA, which makes a recommendation to the President.</td>
</tr>
<tr>
<td>c. Positions whose primary responsibility is to attract external funds for and/or market the University [UNC Policy 300.1.1-I.B]</td>
<td>Delegated by BOG to UNC President</td>
<td>Requests to establish new positions are submitted using an EPA Designation Request, Form 01, and are evaluated by the HRAB-EPA, which makes a recommendation to the President.</td>
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<td>d. Other officers holding positions characterized by active, continuing</td>
<td>Delegated by BOG to UNC President</td>
<td>Requests to establish new positions are</td>
</tr>
<tr>
<td>involvement in formulating, interpreting, and implementing institutional policy</td>
<td></td>
<td>submitted using an EPA Designation</td>
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<tr>
<td>and exercise of substantial independence of administrative authority and</td>
<td></td>
<td>Request, Form 01, and are evaluated by</td>
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<tr>
<td>discretion in areas such as program planning and design and allocation of</td>
<td></td>
<td>the HRAB-EPA, which makes a</td>
</tr>
<tr>
<td>resources. [UNC Policy 300.1.1-I.B]</td>
<td></td>
<td>recommendation to the President.</td>
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</table>
In most cases, persons occupying such positions will function as the director of a specific division or department of institutional activity, reporting at the level of a vice chancellor or dean. However, where circumstances warrant (e.g. in the case of a large and complex department or division), persons functioning as an associate or assistant director may be found to have “significant administrative responsibilities and duties” as defined by the characteristics listed above. In such cases, the position must have substantial responsibility for assisting the primary officer (e.g. director) in formulating, interpreting, and implementing policy and must function in a confidential and direct support relationship to primary officer or have direct responsibility for a specific sphere of operations within the unit. Person nominated to fill such positions normally must have an advanced educational degree and extensive relevant experience and be recruited in a national search process. [UNC Policy 300.1.2]
Assistant / Associate Director of Admissions:

An SAAO assistant/associate director of admissions has significant administrative responsibilities in a large complex department. The position has substantial responsibility for assisting the director of admissions in formulating, interpreting, and implementing policy and typically has direct responsibility for a specific sphere of operation within the admissions office. The position exercises substantial independence of administrative authority and discretion and is authorized to independently commit the institution to admissions decisions. This position typically requires an advanced educational degree or post baccalaureate training and extensive relevant experience.
University of North Carolina
Positions Exempt from the State Personnel Act

Assistant / Associate Director of Financial Aid:

An SAAO assistant/associate director of financial aid has significant administrative responsibilities in a large, complex department. The position has substantial responsibility for assisting the director of financial aid in formulating, interpreting, and implementing policy and typically has direct responsibility for a specific sphere of operation within the financial aid office. The position exercises substantial independence of administrative authority and discretion and is authorized to independently commit the institution to financial aid decisions. This position typically requires an advanced educational degree or post baccalaureate training and extensive relevant experience.
University of North Carolina
Positions Exempt from the State Personnel Act

Instructional and Research
Guidelines on Interpreting General Statute 126-5(c1) [State Personnel Act] provides the following employees are exempt from the provisions of this statute:

- Instructional and research staff, physicians, and dentists of the University of North Carolina.
EPA Instructional and Research Designation Process

The Office of State Personnel and the University of North Carolina have agreed that the following shall govern the interpretation and application of the terms “instructional” and “research” as used in NCGS 126-5(c1)(8).
Instructional

Positions qualifying for designation as “Instructional” are characterized by the following:

- The duties must be associated with regular academic and educational experiences provided by the university, or are uniquely supportive of those academic and educational experiences, and must involve significant and independent interaction with participants in the University’s instructional and educational program.

- The position must require that a substantial proportion of the work commitment be devoted to instructional activities or to the direction of educational/academic supportive activities.

- The position requires the exercise of discretion in determining the nature and content of the instructional or educational activities assigned and evaluating their effectiveness.

- The position requires possession of post baccalaureate credentials or equivalent independent experience in comparable instructional or educational activities. Prefer masters or above, but will accept alternative training and experience patterns. (Stray from this in information technology, coach and assistant coach.)
Instructional

**Instructing**: Positions whose primary purpose is to determine course content, teach and evaluate enrolled students in courses for academic credit. These positions include Lecturers and other teaching positions that may be funded in codes other than 1310.

- Example: Director, Freshman Seminar, Academic Affairs, Appalachian State University. Position exercises administrative oversight of the Freshman Seminar Program, required to teach a minimum of six credit hours per semester, maintaining a familiarity with current research in the field of first-year student development and formal teaching/training of all prospective instructors in the program prior to their assuming their instructional role within it. Requires an earned doctorate and significant experience in programs related to the academic development of first-year college students.
Instructional

Academic Advising: Positions whose primary purpose is to advise students on academic matters such as selection of a major area of study, course selection, and academic performance.

- Example: Academic Advisor, Academic Affairs, UNC Wilmington. This position will guide advisees in course selection by assisting in planning their academic degree programs and providing information on university policies, procedures, programs and resources. Will also identify possible weaknesses and problems in areas of study habits, time management and personal responsibility and will monitor their academic progress. Position will also make appropriate referral to counseling services if necessary. Responsible for organizing, planning and implementing visitation and transfer student orientations as well as meeting and corresponding with prospective education majors answering questions about the School of Education.
Instructional

**Academic Preparation And Enhancement:** Positions whose primary purpose is to improve academic preparation through such means as tutoring and supplemental instruction or to direct programs designed to enhance the educational experience of enrolled students or of targeted secondary school students to help prepare them for post-secondary education.

- Example: Coordinator, Appalachian Transition to Teaching Program, ASU. Position evaluates academic backgrounds of ATTP candidates, helps design individual learning plans, then mentor students. MS in education and five years of teaching and/or administrative work in public schools.

- Example: Director of Project Golden Leaf, ECU. Direct Golden Leaf Educational Consortium, which developed a model of teacher recruitment and retention for economically depressed and tobacco dependent counties in rural North Carolina.

The University of North Carolina – General Administration
Instructional

**Co-Operative Education:** Positions whose primary purpose is to develop co-operative education experiences for students with employers, monitoring progress, and evaluating student performance with direct impact on grade assignment.

*Note: Students are placed in the internships and in co-operative education programs*

- Example: Clinical Dietician Instructor, ECU. Directs and evaluates educational experiences for dietetic interns and students in rural health settings, collaborates to provide medical nutrition therapy for patients at nutritional risk, fosters continuity of care. Evaluates courses and manages delivery of nutrition care serves. Masters in nutrition or closely related area, experience in clinical, community dietetics or teaching.

The University of North Carolina – General Administration
Instructional

**Laboratory Management**: Positions whose primary purpose is to manage practical experience and research laboratories and that participate in selection of experiments, protocols, and procedures which best support the instructional or research goals and in evaluating progress towards goals.

- Example: Director, College of A&S Microscope Facility, ASU. Manages operation of College of Arts and Sciences Electron Microscopy Facility, instruct in interdisciplinary courses in techniques of electron microscopy, teach the lab portion of the intermediate EM Course. Direct and participate in research projects, administrator of the EM facility.
Instructional

**Instructional Consulting:** Positions whose primary purpose is to assist, advise, and critique faculty and other instructional staff on instructional matters such as course content, curriculum structure, and instructional technique.

- Example: Academic Program Consultant, Brody School of Medicine, East Carolina University. Position will design educational and mentoring programs independently as well as through consultation with academic department heads, associate and assistant deans for student affairs, student development and medical school curriculum committees. Will support educational experiences and determine the nature and content of instructional programs for faculty and medical students.
Instructional Technology: Positions whose primary purpose is to utilize a variety of telecommunications and/or advance media-based technology to plan, design, and administer distance education curricula and/or programs in support of instructional and research activities that are directly related to the institution’s academic mission.

Notes: Separated Information Technology from Instructional Consulting in 2003. Involves curriculum development utilizing software application. These positions do not include maintenance and LAN support.

- Example: Instructional Technology Systems Operator and Media Producer, ECU. Located in the Library, Educational Technology and Distance Learning, School of Education. Provides systems administration and programming to faculty and student users of servers of the department. Creates video/media products to support learning and research, over 500 undergraduate education students and 100 lateral entry teachers. Teams with faculty to assess needs, design solutions, and code programming to support the teaching. Research new tools.

- Example: Instructional Designer, ASU. Provides faculty and administrators expertise in the areas of planning, design, production, implementation, use and evaluation of technology-based educational materials. Located in Instructional Technology Center. Proficient in instructional design, development and teaching strategies; visual, textual, sound and motion, graphic design. Masters in instructional design, graphic design with teaching experience or related in the development of web based and online curriculum materials and courses.
Instructional

**Continuing Education:** Positions whose primary purpose is to design and deliver courses, seminars, etc., extending the benefit of the institution’s regular academic and research activities to participants.

- Example: Director for Allied Health, Public Health & Dental Health Education and Health Careers & Workforce Diversity, Health Sciences, East Carolina University. Position will be responsible for the on-going assessment, implementation and evaluation of continuing education activities of health professionals throughout the Eastern AHEC 23-county service region. Will provide consultation and technical assistance based on knowledge and expertise to healthcare facilities, educational institutions and health care providers. Also responsible for increasing the visibility of health careers and workforce diversity in the region while overseeing the activities of both Assistant Directors in their areas of responsibility.

The University of North Carolina – General Administration
Instructional

**Coaching**: Positions whose primary purpose is to coach student athletes for teams sponsored by the institution.

*Notes*: Generally straightforward to classify. Positions must be actively engaged in coaching students. This does not include positions ancillary to an athletic program.

- Example: Assistant Women’s Soccer Coach, ASU. Assist head coach in all phases of soccer program, recruit and evaluate student athletes and related travel. Working knowledge of NCAA rules.
Instructional

**Academic Standards:** Positions whose primary purpose is to develop and/or administer academic standards and curricula for degree granting programs.

- Example: Clinical Research Program Coordinator, UNC-W. Plans, implements and evaluates overall clinical research program and reports for the School of Nursing; new Bachelor of Science degree in nursing. Assigns faculty to individual courses and oversees student-learning activities.
Instructional

**Student Support Services:** Position whose primary purpose is to develop, direct and administer services for students and/or faculty that have a direct impact on the quality of students’ educational experiences and are directly linked to the institution’s academic programs. These positions include professional staff that design and deliver programs and/or seminars that involve direct student interaction with students and enhance the overall academic and learning experience outside the formal classroom setting.

*Notes: These positions do not include operational or facility maintenance functions.*

- Example: Assistant Director for University Center Programs, Student Affairs, Western Carolina University. This position will be responsible for providing education, guidance and service to students and organizations at the University which includes: advising Last Minute Productions, the student programming board and Lectures, Concerts and Exhibitions. Position will also coordinate Up All Night programs, Summer Concert Series, Cyber Café programs and Reel Diversity Film series. Will also oversee the Illusions campus nightclub program and have assistant coordination duties including Welcome Week, Valley Ballyhoo, Spring Fling and the WE LEAD leadership program. Position will teach a USI 130 and/or COUN 141 class and advises the Adult Student Learners’ Organization. Master’s degree in a related field such as student development, student personnel, higher education or counseling and two years experience in student programs, knowledge of student development theory and experience relating effectively to diverse populations.

The University of North Carolina – General Administration
Instructional

**Professional Librarians:** Positions whose primary purpose is to support instructional and research activities by advising students and faculty on the selection and effective use of library resource materials and by working with faculty on instructional and research matters such as collection development.

*Notes: These positions are relatively straightforward to designate if they require a Master of Library Science degree and are considered professional librarians.*

The University of North Carolina – General Administration
Instructional

Counselors: Positions requiring credentialed professionals whose primary purpose is to: provide clinical and developmental counseling or psychological services to students to enhance their psychological growth, emotional well-being, and learning potential; and, advise academic and academic support program directors of special needs, trends, and suggested program revisions based on the interaction with the student population.

Note: These positions must require professional counseling credentials.

- Example: Substance Abuse Education Consultant, ASU. Provide clinical treatment and educational prevention programming related to alcohol and other psychoactive substance abuse disorders. Train interns and students, coordinated mandated referrals, coordinate campus research in alcohol and drug use, abuse and addiction. Masters degree and licensed as a counselor, psychologist, social worker, marriage and family therapist, or psychiatric nurse.

The University of North Carolina – General Administration
Research

Positions qualifying for designation as “Research” are characterized by the following:

- The position must require substantial independence in creativity or research efforts and in the interpretation and dissemination of research results.
- The duties must be integral with the University’s instructional or research activities and represent an extension of the regular academic and educational experience provided by the University.
- The position must require that a substantial portion of the total work commitment is devoted to those research activities.
- The position requires possession of a post-baccalaureate credentials or a comparable record of independent research productivity.
Research

**Academic Computing:** Positions whose primary purpose is to direct staff in providing electronic data processing services that directly support the institution’s academic and research missions.

*Notes: The positions supervise staff that support specific academic and research programs as opposed to general LAN or operational computing support services.*
Academic Research: Positions whose primary purpose is to serve as principal investigators or research associates for primary or secondary research projects that may advance or enhance a field of academic learning. These positions function with substantial independence and expertise in research design, implementation of research procedures, data analysis and interpretation of results.

Notes: These positions do not include operational support related positions.

- Example: Research Associate, Health Sciences/Microbiology and Immunology, East Carolina University. Position will lead a scientific research laboratory and be responsible for planning, prioritizing, scheduling, designing research protocols, conducting and analyzing various experiments for a wide variety of funded research projects. Will compile and evaluate data and prepare extramural grant applications and research reports (written and oral). Supervises research activities and trains undergraduate, graduate and medical students and research technicians as well as collaborating students and scientists from other laboratories. Must test and optimize new research hypotheses while pioneering new techniques. Gives professional presentations, writes scientific manuscripts and researches results for publication.
Research

**Community Service:** Positions whose primary purpose is to direct staff in the development and administration of programs which focus the academic resources and research products of the institution on the resolution of community and regional issues and foster the incorporation of these issues in the institution’s academic research programs.

*Notes: These positions may be direct supervisors or responsible for providing technical direction (i.e., not direct supervisors on the organizational chart) of others in support of programs.*

- Example: Regional Service Center Director, College of Business, Western Carolina University. This position will be responsible for managing the counseling activities of the Regional Service Center, managing and providing supervision and direction for all professional and staff personnel, oversight and management of Center’s budget, promoting the Small Business and Technology Development Center throughout the multi-county area served and design and delivery of training and management programs within the region.
Research

**Institutional Research:** Positions whose primary purpose is to direct staff in the collection of data and information concerning students, faculty, facilities and related items used for reporting and directly supports the institution’s planning and assessment processes.

- Example: Director for Institutional Research and Testing, Institutional Planning, Research and Effectiveness, East Carolina University. This position is responsible for maintaining and reporting institutional data related to student enrollments; human, physical and financial resources; and degree programs. Also responsible for overseeing the development and integration of the faculty report process and updating and maintaining the academic publication database. Position will be responsible for reporting institutional data to the UNC General Administration and other external agencies as well as for the publication of the Factbook, The University at a Glance and other publications and reports. Will be responsible for enrollments planning, initiating research to inform policies and practices and resource to campus administrators in ad hoc requests. Oversees the operations of the University Testing Center and supports various accreditation and program review processes. Position also supervises professional staff and graduate assistants.
Research

**Research Administration:** Positions whose primary purpose is to direct staff serving as principal investigators assigned to research projects; or positions that serve as directors of sponsored research including determining if project proposals as consistent with the institution’s academic and research policy, advising staff on the development of project proposals and negotiating with sponsoring agencies particularly as it relates to terms and conditions that affect academic freedom and ownership of the product.

*Notes: These positions do not include contract and grants developers, writers, or administrative support.*

- Example: University Veterinarian, Office of Research, UNC Charlotte. This position will make routine visits to facilities and laboratories at which time facility operations and health status of every animal are assessed. Position will work closely with staff to ensure the prevention, control, diagnosis and treatment of diseases and injuries in laboratory animals and will provide guidance to principal investigators and others involved in the care and use of animals regarding handling, immobilization, anesthesia, analgesia, tranquilization and euthanasia. Will also conduct training workshops on a regular basis and observe surgical procedures to ensure faculty are properly trained. Position will also review the University’s operating procedures to ensure conformity with all applicable state and federal regulations for the humane care and use of laboratory animals as well as established veterinary medical and nursing practices.
Research

**Technology Transfer**: Positions whose primary purpose is to manage the flow of research innovation, disclosures, patents, trademarks, copyrights and other aspects of technology transfer. These positions include professional staff who assess each disclosure for its technical and commercialization merits, develop relationships with industry, negotiate business transactions for the exchange of intellectual property rights, collaborate with regional and state economic development agencies and/or engage in other aspects of technology transfer such as negotiating licensing or equity agreements. These positions also provide outreach services such as training and education to university faculty and students.

- Example: Technology Development Associate, Office of Technology Transfer, UNC Charlotte. This position will be primarily responsible for: assisting faculty and students with new invention disclosure generation and their technical merit, commercial viability and prior art conflicts, interacting with legal counsel on patent and copyright filings, monitoring deadlines for patent prosecution and maintenance, marketing inventions for potential licensing, managing Confidential Disclosure Agreement and Material Transfer Process, monitoring licensee progress and compliance, reviewing and negotiating all IP terms as related to industry, foundation and government sponsored research, assisting Office of research with all Bayh-Dole reporting and compliance requirements, faculty and student outreach and training and manage and monitor OTT metrics. Position will also assist the Executive Director with mentoring new university start-ups and university-related economic development activities. Baccalaureate degree in Life or Physical sciences, advanced degree in Science, Law and/or Business and 1-2 years work experience in an academic, hospital or research institution.
EPA Instructional and Research Designation Process

When reviewing position descriptions, look at the primary purpose of the position for cues to the role. The primary function and duties should be instructional or supportive of academic and educational experiences, and constitute at least 50% of the position in order be considered for EPA status.
EPA Designation Request Form
UNC General Administration

Step by Step
EPA Subcommittee Web Site

- **EPA Subcommittee of the HR Council Meeting Materials**
  Link to the monthly EPA Subcommittee of HR Council meeting materials.
  [http://www.northcarolina.edu/hr/hrab/meetings/index.php](http://www.northcarolina.edu/hr/hrab/meetings/index.php)

- **EPA Subcommittee of the HR Council**
  Summaries of past meetings and schedule of upcoming events.
  [http://www.northcarolina.edu/hr/hrab/meetings/index.php](http://www.northcarolina.edu/hr/hrab/meetings/index.php)

- **EPA Resource Information**
  Link to documents that provide comparisons of employment policies, descriptions of generic SAAO positions, and information on the approval authority required to establish EPA positions and to implement EPA appointments, promotions, and compensation actions.
  [http://www.northcarolina.edu/hr/hr_council/EPA_Res_Info.htm](http://www.northcarolina.edu/hr/hr_council/EPA_Res_Info.htm)
EPA Designation Request Form
UNC General Administration

Institution: _________________________________________________________

Division/School/Department: ____________________________

EPA Designation Requested:

[ ] Senior Academic and Administrative Officer, I.A.* (SAAO, Tier I)
[ ] Senior Academic and Administrative Officer, I.B.* (SAAO Tier II)
[ ] Instructional
[ ] Research

*As defined by SAAO Policy, Paragraph I.A. or I.B.

The University of North Carolina – General Administration
EPA Designation Request Form
UNC General Administration

Proposed Position Information:

Proposed Title: _______________________________________________________

Proposed Working Title (if different): _______________________________

Proposed Position Number (if applicable): ____________________________

Proposed JCAT Code: _______________________________________________
EPA Designation Request Form
UNC General Administration

<table>
<thead>
<tr>
<th>Current Position Information (if applicable):</th>
</tr>
</thead>
<tbody>
<tr>
<td>Current Status: SPA</td>
</tr>
<tr>
<td>Current Title:</td>
</tr>
<tr>
<td>Current Position Number:</td>
</tr>
<tr>
<td>Name of employee in position:</td>
</tr>
<tr>
<td>Name and title of supervisor:</td>
</tr>
</tbody>
</table>

The University of North Carolina – General Administration
EPA Designation Request Form
UNC General Administration

<table>
<thead>
<tr>
<th>Institutional Authorization:</th>
</tr>
</thead>
<tbody>
<tr>
<td>Print Name: ___________________ Title: ________________</td>
</tr>
<tr>
<td>Signature: ___________________ Date: ________________</td>
</tr>
<tr>
<td>Mailing Address:____________________________________</td>
</tr>
<tr>
<td>Telephone: ___________ Fax: _________ Email: ___________</td>
</tr>
</tbody>
</table>

The University of North Carolina – General Administration
EPA Designation Request Form
UNC General Administration

Submit completed form with the following required documentation:

✓ A written justification for requested action that includes specific reference to relevant elements in SAAO definition or Instructional/Research definitions

✓ A detailed position description

✓ An organizational chart that includes position titles, position numbers, position designations (SPA, EPA, SAAO), and employee names

✓ The form should be submitted electronically by the authorized campus designee.
EPA Designation Request Form
UNC General Administration

Submit to:

Associate Vice President for Human Resources
UNC General Administration, P.O. Box 2688
Chapel Hill, NC  27515

Fax:  919-843-8327
Phone:  919-962-4555
Email:  awlemmon@northcarolina.edu
Web:  http://www.northcarolina.edu/hr/hrab/EPA_Form_1.pdf
What makes a good submission?

- **Written Justification**
  - State the *primary* purpose of the position
  - Provide specific reference to what criteria make it EPA
  - If Instructional/Research, how the position is specific to the University (not found at State agencies)

- **Job Descriptions**
  - Need a detailed job description that describes all functions of the job
  - Provide the education/experience levels, required and preferred
What makes a good submission?

- **Titles**
  - Real title
  - Working Title
  - If currently SPA, need classification

- **Organization Charts**
  - Submitted job outlined, highlighted, circled, etc.
  - EPA and SPA positions indicated
  - Multiple levels shown (i.e., where it reports, what reports to it)
What makes a good submission?

- **Content**
  - Admissions: does it commit the University to accepting students
  - Communications/Marketing: does it develop the overall strategy, not just produce materials
  - Development: is the primary purpose to ask for money
  - Financial Aid: does it commit the resources of the University
Questions?