

APPENDIX V

PETITION FOR SPRING 2002

PETITION REGARDING POLITICAL ACTIVITY

FROM: Name: Stephen Michael Metcalf
Institution: Western Carolina University
Position held: Director of Local Government Relations
TO: (X) Western Carolina University
Board of Trustees
c/o Office of the Chancellor
Western Carolina University
Cullowhee, North Carolina 28723
(x) Committee on University Governance
UNC Board of Governors
c/o Office of the President
The University of North Carolina
Post Office Box 2688
Chapel hill, North Carolina 27515-2688
SUBJECT: Request for review of proposed political candidacy
or officeholding

A. In accordance with The University of North Carolina
policy regarding political activities of its employees,
this petition concerns:

- (X) My intention to campaign for election to a
full-time or major part-time political office

Title of office: N. C. Senate

Full-time or
major part-time: Major Part-time

Primary or general
election date: General Election 11/2002

Period of proposed
campaign activity: Present - April 2002

- (x) My intention to occupy a full-time or major
part-time political office, either elective or
appointive

Title of office: N. C. Senate

Full-time or
major part-time: Major Part-time

Term of office: 01/01 - 12/02

Period of
employment affected: Spring 2002

B. With respect to my candidacy for election to political office, I request permission:

(X) To maintain my full-time University employment while campaigning in support of my request I have provided/attached:

1. A detailed account of my anticipated normal employment responsibilities during the affected period of employment (Attachment A)
2. An explanation of proposed campaign activity, demonstrating how such activity will be limited to available personal time, so as not to interfere with the satisfactory performance of full-time employment responsibilities (Attachment B)
3. The written concurrence of my supervisors and the Chancellor in the conclusion that engagement in campaign activities will not interfere with the satisfactory performance of my full-time employment responsibilities. (TO BE ATTACHED BY CHANCELLOR'S OFFICE AFTER CHANCELLOR'S REVIEW AND BEFORE BEING SENT TO GOVERNING BOARD.)

() If my request to maintain full-time employment is denied, to take a partial leave of absence, with corresponding reduction in pay, for the period

N/A

(_____); in support of my request I have provided/attached:

1. A detailed account of my anticipated normal employment responsibilities during the affected period of employment (Attachment A)
2. An explanation of proposed campaign activity (Attached B)
3. Identification of those employment responsibilities that I propose not to meet, consistent with such a partial leave of absence, and calculation of percentage reduction in employment time (Attachment C)
4. Assurances by my supervisors and the Chancellor that granting such a leave is practicable and that alternative arrangements can be made to insure performance by others of the employment responsibilities for which I otherwise would be responsible. (TO BE ATTACHED BY CHANCELLOR'S OFFICE AFTER CHANCELLOR'S REVIEW AND BEFORE BEING SENT TO GOVERNING BOARD.)

() If my request to maintain full-time employment or
N/A to be granted a partial leave is denied, to take a
full leave of absence, without pay, for the period
_____ ; in support of my
request I have provided/attached:

1. A detailed account of my anticipated normal employment responsibilities during the affected period of employment (Attachment A)
2. Assurances by my supervisors and the Chancellor that granting such a leave is practicable and that alternative arrangements can be made to insure performance by others of the employment responsibilities for which I otherwise would be responsible. (TO BE ATTACHED BY CHANCELLOR'S OFFICE AFTER CHANCELLOR'S REVIEW AND BEFORE BEING SENT TO GOVERNING BOARD)

C. With respect to my occupancy of a full-time public office:

() I request permission to be granted a full leave of
N/A absence, without pay, as distinguished from
resigning my University employment; I understand
that the maximum period of such leave allowed by
University policy is two years; in support of my
request, I have provided/attached:

1. A detailed account of my anticipated normal employment responsibilities during the affected period of employment (Attachment A)
2. Assurances by my supervisors and the Chancellor that granting such a leave is practicable and that alternative arrangements can be made to insure performance by others of the employment responsibilities for which I otherwise would be responsible. (TO BE ATTACHED BY CHANCELLOR'S OFFICE AFTER CHANCELLOR'S REVIEW AND BEFORE BEING SENT TO GOVERNING BOARD)

D. With respect to my occupancy of a major part-time office, I request permission:

(X) To maintain my full-time University employment while holding office; in support of my request I have provided/attached:

1. A detailed account of my anticipated normal employment responsibilities during the affected period of employment (Attachment A)

2. An explanation of the time requirements associated with holding the public office, demonstrating how such activity will be limited to available personal time, so as not to interfere with the satisfactory performance of my full-time employment responsibilities (Attachment D)
 3. The written concurrence of my supervisors and the Chancellor in the conclusion that the time requirements associated with holding the public office will not interfere with the satisfactory performance of my full-time employment responsibilities. (TO BE ATTACHED BY CHANCELLOR'S OFFICE AFTER CHANCELLOR'S REVIEW AND BEFORE BEING SENT TO GOVERNING BOARD)
- () If my request to maintain full-time
N/A employment is denied, to take a partial leave of absence, with corresponding reduction in pay, for the period of officeholding; in support of my request I have provided/attached:
1. A detailed account of my anticipated normal employment responsibilities during the affected period of employment (Attachment A)
 2. An explanation of the time requirements associated with holding the public office (Attachment D)
 3. Identification of those employment responsibilities that I propose not to meet, consistent with such a partial leave of absence, and calculation of percentage reduction in employment time (Attachment C)
 4. Assurances by my supervisors and the Chancellor that granting such a leave is practicable and that alternative arrangements can be made to insure performance by others of the employment responsibilities for which I otherwise would be responsible. (TO BE ATTACHED BY CHANCELLOR'S OFFICE AFTER CHANCELLOR'S REVIEW AND BEFORE BEING SENT TO GOVERNING BOARD)

() If my request to maintain full-time employment or
N/A to be granted a partial leave is denied, to take a
full leave of absence, without pay, for the period
_____; in support of my
request I have provided/attached:

1. A detailed account of my anticipated normal employment responsibilities during the affected period of employment (Attachment A)
2. Assurances by my supervisors and the Chancellor that granting such a leave is practicable and that alternative arrangements can be made to insure performance by others of the employment responsibilities for which I otherwise would be responsible. (TO BE ATTACHED BY CHANCELLOR'S OFFICE AFTER CHANCELLOR'S REVIEW AND BEFORE BEING SENT TO GOVERNING BOARD)

E. With respect to any request embodied in this petition, the petitioner should offer any additional written explanation or information that in his or her judgment would assist supervisors, the Chancellor or the Board of Governors in making a decision whether to grant the request.

Steve Muty
Signature of Petitioner

2/14/02
Date submitted

John W. Bardo
Signature of Chancellor

2-15-02
Date received by Chancellor

2-15-02
Date submitted to Office of the President

L.S. Corquati
Signature of Secretary of the University

2/20/02
Date

Petition Attachment A:

Detailed account of anticipated normal employment responsibilities during the affected period of employment; the information to be provided presupposes a standard eight-hour work day and a forty-hour work week and requires a demonstration of how that amount of employment time is accounted for and scheduled; the petitioner may supplement this form with a narrative account that further explains employment obligations and time commitments.

<u>Stephen Michael Metcalf</u>	<u>Spring 2002</u>
Name of Petitioner	Employment period affected

1. Non-faculty employees (for those employees who regularly follow a standard eight-hour day and forty-hour week).

Length of required work day: _____ (number of hours)

Hours of work, from _____ (a.m.) to _____ (p.m.)

Days of week to which scheduled work applies: _____

2. Faculty employees (and other employees who do not necessarily follow standard schedule of eight-hour days and forty-hour weeks)

<u>Duties</u>	<u>Hours per week</u>	<u>% of total</u>
Teaching (classroom, laboratory, etc.)	_____	_____
Instructional preparation	_____	_____
Counseling students	_____	_____
Other instructional responsibilities	_____	_____
Evaluating student performance	_____	_____
Research and writing	_____	_____
Institutional Committee service	_____	_____
Administrative service	_____	_____

Current professional development	_____	_____
Other (specify)	_____	_____
_____	_____	_____
_____	_____	_____
Totals:	_____	_____
	Hours/week	

My normal working hours are irregular in that I often have meetings with local officials and different community groups in the evening and weekends. In addition, I often represent Western at conferences. As a result, my schedule is rarely 8 a.m. – 5 p.m., Monday thru Friday work week and often work more than 40 hours per week. I will maintain a log to document time.

Petition Attachment B:

Explanation of nature, extent and schedule of
proposed campaign activity

I do not anticipate opposition in the May 2002 primary election. However, I will likely have opposition in the general election in November. My campaign activities will be confined to after hours and weekends. I will not allow campaign activities to interfere with my responsibilities to Western Carolina University. In addition, I have hired a full time campaign manager to handle campaign activities and constituent services.

Petition Attachment C:

Identification of employment responsibilities not
to be performed pursuant to partial leave of
absence

<u>Duties to be eliminated or reduced</u>	<u>Hours per week</u> (average)
<u>N/A</u>	
<u></u>	
<u></u>	
<u></u>	
<u></u>	

Totals

hours/week

Percentage reduction in weekly employment time:

Note: Policies of the Board of Governors do not permit partial or full leaves of absence, for a portion of a semester, that would affect adversely the instructional services available to students, e.g., substituting another instructor for the petitioner to teach a course for a portion of the academic term (as distinguished from such substitution for the full term).

Petition Attachment D:

Explanation of nature, extent and schedule of required
duties as officeholder

Responsibilities of the General Assembly during this time period include communication with the general public, constituent service and legislative committee work. The General Assembly is not scheduled to be in session during this time. In order to fulfill my responsibilities to Western Carolina University, I will devote time outside of the normal working hours to communication with the general public and constituent service. In addition, my legislation assistant is experienced and knows the demands of my district well. And further, I have hired a full time employee to work on constituent service and to serve as a campaign manager.

Legislative committee work will require an occasional trip to Raleigh. I am confident that I will be able to perform much of my responsibilities for the university while in Raleigh or in enroute via cell phone. And in addition, many of my university responsibilities, such as meetings with city and county officials, are performed on weekends and after normal business hours.

PETITION FOR SUMMER 2002

PETITION REGARDING POLITICAL ACTIVITY

FROM: Name: Stephen Michael Metcalf
Institution: Western Carolina University
Position held: Director, Office of Local Government Relations

TO: (X) Western Carolina University
Board of Trustees
c/o Office of the Chancellor
Western Carolina University
Cullowhee, North Carolina 28723

(X) Committee on University Governance
UNC Board of Governors
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or officeholding

A. In accordance with The University of North Carolina
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this petition concerns:

(X) My intention to campaign for election to a
full-time or major part-time political office

Title of office: N. C. Senate

Full-time or
major part-time: Major part-time

Primary or general
election date: General Election 2002

Period of proposed
campaign activity: May - August, 2002

(X) My intention to occupy a full-time or major
part-time political office, either elective or
appointive

Title of office: N. C. Senate

Full-time or
major part-time: Major part-time

Term of office: 01/01 - 12/02

Period of
employment affected: May - August, 2002

B. With respect to my candidacy for election to political office, I request permission:

N/A

() To maintain my full-time University employment while campaigning in support of my request I have provided/attached:

1. A detailed account of my anticipated normal employment responsibilities during the affected period of employment (Attachment A)
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I request

(X) ~~If my request to maintain full-time employment is denied,~~ to take a partial leave of absence, with corresponding reduction in pay, for the period

(1/2 time; May-August); in support of my request I have provided/attached:

1. A detailed account of my anticipated normal employment responsibilities during the affected period of employment (Attachment A)
2. An explanation of proposed campaign activity (Attached B)
3. Identification of those employment responsibilities that I propose not to meet, consistent with such a partial leave of absence, and calculation of percentage reduction in employment time (Attachment C)
4. Assurances by my supervisors and the Chancellor that granting such a leave is practicable and that alternative arrangements can be made to insure performance by others of the employment responsibilities for which I otherwise would be responsible. (TO BE ATTACHED BY CHANCELLOR'S OFFICE AFTER CHANCELLOR'S REVIEW AND BEFORE BEING SENT TO GOVERNING BOARD.)

(
N/A) If my request to maintain full-time employment or to be granted a partial leave is denied, to take a full leave of absence, without pay, for the period _____; in support of my request I have provided/attached:

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C. With respect to my occupancy of a full-time public office:

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N/A) I request permission to be granted a full leave of absence, without pay, as distinguished from resigning my University employment; I understand that the maximum period of such leave allowed by University policy is two years; in support of my request, I have provided/attached:

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I request

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Steve Mety
Signature of Petitioner

2/14/02
Date submitted

John W. Bardo
Signature of Chancellor

2-15-02
Date received by Chancellor

2-15-02
Date submitted to Office of the President

L. B. Conquati
Signature of Secretary of the University

2/20/02
Date received by Secretary

Petition Attachment A:

Detailed account of anticipated normal employment responsibilities during the affected period of employment; the information to be provided presupposes a standard eight-hour work day and a forty-hour work week and requires a demonstration of how that amount of employment time is accounted for and scheduled; the petitioner may supplement this form with a narrative account that further explains employment obligations and time commitments.

<u>Stephen Michael Metcalf</u>	<u>May - August, 2002</u>
Name of Petitioner	Employment period affected

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Length of required work day: _____ (number of hours)

Hours of work, from _____ (a.m.) to _____ (p.m.)

Days of week to which scheduled work applies: _____

2. Faculty employees (and other employees who do not necessarily follow standard schedule of eight-hour days and forty-hour weeks)

<u>Duties</u>	<u>Hours per week</u>	<u>% of total</u>
Teaching (classroom, laboratory, etc.)	_____	_____
Instructional preparation	_____	_____
Counseling students	_____	_____
Other instructional responsibilities	_____	_____
Evaluating student performance	_____	_____
Research and writing	_____	_____
Institutional Committee service	_____	_____
Administrative service	_____	_____

Current professional development	_____	_____
Other (specify)	_____	_____
_____	_____	_____
_____	_____	_____
Totals:	_____	_____
	Hours/week	

My normal working hours are irregular in that I often have meetings with local officials and different community groups in the evening and weekends. In addition, I often represent Western at conferences. As a result, my schedule is rarely 8 a.m. – 5 p.m., Monday thru Friday work week and often work more than 40 hours per week.

My proposal is to work one-half (1/2) time for Western while the General Assembly is in session. I will maintain a log to document time.

Petition Attachment B:

Explanation of nature, extent and schedule of
proposed campaign activity

I do not anticipate opposition in the May 2002 primary election. However, I will likely have opposition in the general election in November. My campaign activities will be confined to after hours and weekends. I will not allow campaign activities to interfere with my responsibilities to Western Carolina University. In addition, I have hired a full time campaign manager to handle campaign activities and constituent services.

Petition Attachment C: .

Identification of employment responsibilities not
to be performed pursuant to partial leave of
absence

<u>Duties to be eliminated or reduced</u>	<u>Hours per week</u> (average)
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<u>Specific responsibilities will not be</u>	
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<u>eliminated. Will devote fewer hours.</u>	
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<u>Will maintain log to document time.</u>	
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Totals

_____ hours/week

Percentage reduction in weekly employment time: _____

Note: Policies of the Board of Governors do not permit partial or full leaves of absence, for a portion of a semester, that would affect adversely the instructional services available to students, e.g., substituting another instructor for the petitioner to teach a course for a portion of the academic term (as distinguished from such substitution for the full term).

Petition Attachment D:

Explanation of nature, extent and schedule of required duties as officeholder

Responsibilities of the General Assembly during this time period include communication with the general public, constituent service and legislative committee work. The General Assembly will also be in session. In order to fulfill my responsibilities to Western, I will devote time outside of the normal working hours to communication with the general public and constituent service. In addition, my legislation assistant is experienced and knows the demands of my district well.

While in session, I will be in Raleigh approximately three days a week. I am confident that I will be able to perform much of my responsibilities for the university while in Raleigh. During times that do not conflict with my legislative commitment. And in addition, many of my university responsibilities, such as meetings with city and county officials, are performed on weekends and after normal business hours.

I will confine campaign activities to after hours and weekends. In addition, I have hired a full time campaign manager to handle campaign activities and constituent services. I will maintain a log to document my time.