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You’re finishing a PhD and you’ve just gotten a phone call with a verbal job offer. Congratulations! And welcome to the bottom of a whole new pyramid.

But before you get to the new pyramid, you need to do something you’ve probably never done before in your life: negotiate a real job offer.

What follows is basically the distillation of advice given to me when I worked in management consulting, when I first graduated from my PhD, and again when I deliberated over my move to Columbia. Plus what I’ve seen watching friends go through the market, or coached students through. I think it applies both to research and many teaching universities, at least in my experience. Most of the good ideas come from others.

*The process*

You’ll often get a verbal offer first, with few details other than enthusiasm.

Most of the key details come shortly afterwards, in a formal offer letter. This will probably have most of the important parameters spelled out (salary, research funding, teaching load, path for promotion, etc). Others are standard and will be listed in the faculty handbook or other administrative materials that they will give you or you can find online (like faculty benefits, restrictions on outside income sources, etc.). A few last parameters are unwritten, and governed by needs or norms in the department (e.g. specific teaching needs, administrative load, and so forth).

Ideally you also get a “victory lap” visit, so you can learn more about your colleagues and the job, figure out the unwritten rules and norms, and get to know the neighborhood. This is a really important thing to do, and I encourage you to ask for a visit if they don’t offer. Or do it yourself if need be.

Towards the end of this post I try to give a pretty comprehensive list of all the parameters, most of which you’ll want to figure out before you sign. Only a few are negotiable and important, though.

*Negotiating*

1. Whenever you negotiate, don’t feel nervous or ashamed or worried about it. Be mature, open, reasonable, and somewhat firm. Also, don’t be greedy or a jerk, or get full of yourself. You have to walk a line between the two–i.e. you’ll have to be a professional–and it’s not that hard, especially if you are polite and seek advice.
2. If you don’t have competing offers (or if one offer is clearly better than all the others) you don’t have much negotiating power but you do have a little. Think about the two or three things that would make you happy and successful at the school. This might be start-up research funds, or maybe you need a higher salary because of loans or kids. Be frank with the department and ask if they have any room to move on one or two of those margins. To the extent you can frame them as in everyone’s interest, it helps. For example: “My research can be expensive and extra research funds would really let me seed new projects in my first couple of years, meaning I’ll have a better tenure packet”. Often they want you to be successful and have some room to move.
3. If you’re among the lucky few with several good opportunities, then narrow it down to the 2 or 3 real contenders and quickly decline the other offers. This way they can go to the next person on their list. Decline not only politely, but also thank them profusely and emphasize how much you liked the department, hope for future interaction, and so forth, but you think that either school X or Y will be the best fit for where you want to be personally and professionally.
4. My sense is that many universities have a boilerplate letter and set of terms that you get right away, and if you have a credible competing offer, they can often match those competing terms.
5. If you have competing offers, consider playing with an open hand. That is, if the best offer is from X, then share that offer with Y and Z and see if they can match at all. For my own use I made a small spreadsheet with the different terms of the package as rows (see below) and columns with schools, and shared with my advisors. Their advice, which worked well, was to share that spreadsheet with the schools. I also offered to share the actual offer letters, and sometimes did. It worked well. Basically, department chairs want you and need something hard they can take to their Dean.
6. Once you know where you want to be, then you can choose to say to one school, “If you do A, B and C then I will sign immediately”. There’s a good chance that they’ll do A, B and C. Again, it comes down to something very firm that a chair can take to the Dean. If you’ve already gone through process 3 above, and wrung things out of the school, maybe you should just ask for A and not B-C (let alone D). It’s hard to generalize.
7. For things A to D that you want, to the extent these are things that will make you professionally successful rather than simply enrich you, this is probably easier to negotiate. Framing a request in terms of “this will help me succeed in the position and get tenure or take on more students” articulates a shared interest and doesn’t come off as greedy.
8. You can always ask universities—either the chair or the faculty you’ve met there—what the flexible and inflexible margins are at that particular school. For instance, some institutions won’t yield on teaching load, while others are more budget constrained but can provide non-financial relief with more ease.
9. Don’t draw out the process, and don’t string schools along if you’re not serious about their offer. You can do this for a very short while for leverage, but I don’t recommend it beyond that.
10. If you receive an exploding offer, things get tricky. This can be a bargaining move to make you choose quickly. When they need the offer to go to another, it’s a legitimate if unfortunate move and you may only be able to negotiate for a little more time. If they aren’t waiting to give the offer to someone else, I suspect you can call their bluff. Every case is different. But as the deadline approaches, a sincere ” I could very likely say yes in X days but I can’t say yes by your deadline” is a “no” that puts the onus on them to take the offer away rather than have you decline it, and I think it will buy you some time.
11. Anything you really care about, get written in the offer letter. As a rule of thumb, I assume that anything not in the offer letter will be reneged on. Of course, there are always things that can’t go in the letter because they’re difficult, unusual, or not allowed to be contracted on. Just discount them in your mind.
12. Do not parade your offers or discussion around other students or colleagues on the job market. You never push yourself up by pushing others down.

*Parameters of an offer*

I’m the kind of person who makes detailed spreadsheets and lists around important decisions. Here, essentially, are the rows in my spreadsheet when I’m thinking about an offer.

1. Remuneration
	1. Salary amount (and is it a 9 or 12-month salary?)
	2. Summer salary (summer ninths)?
	3. Other, slightly minor things: Moving allowance, consulting/outside income restrictions, housing purchase assistance/rent subsidies (in large or expensive cities), benefits program (and cost/contributions), retirement plan/matching contributions
2. Research funding
	1. Research funding per year and/or start-up account?
	2. Other: Responsible for own computer/office equipment purchase from research account?
3. Teaching and other duties
	1. Annual course load in equilibrium
	2. Course expectations (level, type)
	3. Course forgiveness in first 1-2 years?
	4. Expectations in terms of administrative duties
	5. Note that basic parameters of an academic job might be quite different outside the US (e.g. many French positions are formally civil service positions)
4. Your clock
	1. Path for promotion (i.e. Length of tenure clock/Expected years for reviews)
	2. Expectations for promotion/tenure in the department, and record
	3. Sabbatical/leave policy
	4. Post-docs: Would they let you do one elsewhere for a year, so you can get a head start on publishing the dissertation?
5. Colleagues and students
	1. Think about who you’ll be working and collaborating with, and where you fit in and get along best.
6. Things outside the university you might care about
	1. Cost of living of the area (i.e. salary in real terms).
	2. Amenities that are important to you (crime, schools, etc)
	3. Tax implications of the place (can vary a lot)
	4. There are generally websites that will actually do city-to-city comparisons of cost and amenities for most of these.

Some notes:

* Salary and research funding are generally negotiable and vary a lot from person to person in a department.
* Other things are sometimes negotiable, sometimes not, depending on university policy and practice: Summer salary, teaching load, course forgiveness. They may not exist at every school.
* There are unwritten, informal practices that you’ll want to get some information on, but you want to do this delicately, and not too early in the discussions. Administrative load and promotion expectations and record are important to understand. They are seldom flexible, so ask mainly to understand not to negotiate.
* All the “other” items are important, but you can figure them out after initial parameters are set. For instance, summer ninths plus outside income plus retirement contributions could end up being large chunk of your remuneration, and is often overlooked by people at this stage.
* Overall, treat this as a checklist for things you should know before you sign up for 3-4 years in a place. But they’re not all things you ask of the department chair.

Advice from colleagues and other experiences welcome in comments.

**Comments on this article:**

I would add that it can be important to discuss the benefits package too. Some places offer 15% to retirement, no matching required, starting immediately. Others offer 10%, only with matching, after two years. Some places offer family health insurance plans that cost $300 a month, while others cost $1000. Those differences add up, while referring to them appears practical not greedy, and departments can take those concrete numbers to their dean easily. Good salary negotiation tool.

I would say that negotiating a job offer for the first time is hard. There are worries, doubts and insecurities we feel to ourselves that will hinder us in showing our best and that is a big problem. Most us do have the same mentally and allow themselves to overrule by those hindrances. We need to think differently and out of the box to divert our weaknesses as our weapon in facing such challenge, that’s what I have learn on [personal development blogs](http://mythinking.net/think-differently/) that I read.