



## College of Arts & Sciences Managers' Meeting

Wednesday, April 14, 2021

10:30 a.m. – 12:00 p.m.

[Recording](#)

**Welcome** - Ashante Diallo, Associate Dean for Human Resources

**Jenn Scott** - Clery Compliance Coordinator, University Police Department

Clery is a federal public information law that all college campuses that receive federal funds must comply with regarding transparency around crime, programming, and prevention. All related to campus safety issues. The law requires that campuses identify and train campus security authorities (CSAs). The law outlines 4 categories of CSAs the University must designate:

- Sworn law enforcement officers in the UNC-CH Police Department
- Non-sworn campus security personnel, such as, but not limited to, those working at
  - Ackland Museum
  - Playmakers Theater
  - University athletic events
- Staff in offices designated as “reporting options” under UNC policy
  - Equal Opportunity and Compliance Office
  - Office of the Dean of Students
  - UNC-CH Police Department
- Officials with significant responsibility for student and campus activities outside of normal classroom instruction, such as, but not limited to:
  - Deans and Department Heads
  - Program Directors and Associate Directors
  - Academic advisors
  - Staff in student affairs and student support roles
  - Study Abroad personnel
  - Resident Advisors and Safewalk Employees

Everyone who is a CSA is also a responsible employee, these are employees who are responsible for supervising students or other professional staff. Not every employee is a Campus Security Authority. "Back office" clerical staff, accounting and IT personnel, and faculty without responsibilities beyond classroom instruction are generally not designated as CSAs. Individuals who are not designated as CSAs are strongly encouraged (but not obligated) to report Clery qualifying crimes to the UNC Police Department. Training is required annually for each CSA.

**Rebecca Spanos** - Travel and Payment Card Services Manager, Travel Services  
[Presentation](#)

The new travel system will be forgoing the pilot and rolling out to the entire campus on April 27<sup>th</sup>. The beginning and end of the travel process are concur requesting and concur expense. Concur Request is the new process for Pre-Travel Approval Required for all travel which includes airfare, lodging, and/or per diem. This will be routed through department approvals and may include OSR, Export Control, and UNC Global. Request ID number will replace CABS. Concur expense is the new expense tool that will replace Web Travel. This is the required method of reimbursement for all employee travel and will also be used for Business Entertainment Expense reimbursement. This will route through department approvals and Travel Office and may include OSR. Travel & Expense Card transactions will feed directly into Concur.

The new system will allow users to book with World Travel, Inc. Online through concur travel will be easy to use through an online booking tool, much like what is used for vacation travel. This is recommended for domestic and simple international travel. There is also a live agent option where a trained and knowledgeable agent team will be available to users by phone or email. This is recommended for complex domestic and international travel. Travel agents can be assigned to make bookings for users, along with access to all UNC-CH negotiated rates that are built in travel policy compliance.

The Travel and Expense (T&E) card will be available to University employees who are 21+ years of age and who have frequent travel or

business entertainment expenses. It can also be used for most allowable travel expenses, except personal meals and mileage. Transactions are reconciled in Concur Expense along with out-of-pocket expenses.

The process for students and guests is the same currently. Airfare may still be booked utilizing CABS with the World Travel, Inc. agents assisting. Student expense reimbursements may still be processed in Web Travel and guest expense reimbursements may still be processed through Campus Voucher.

As the new system is rolled out, historical travel expense data will be shared with units to confirm T&E card applicants, demos of Concur Request, Travel, & Expense will be provided for campus unit finance leads and business offices. Assignments of Concur approvers will be made through ConnectCarolina. Training materials for users to review and learn will be released, as well as future Q&A sessions to be scheduled.

**Joanna Cardwell** - Communications Specialist, Arts & Sciences Foundation

### [Presentation](#)

The annual cycle of fund stewardship is as follows – receive distributions during the summer, spend the funds throughout the academic year, report usage in April and finalize all of the information by the end of June.

When departments receive the endowment distribution report in the summer, be sure to take action by reinvesting unused payouts so funds can grow faster and produce larger distributions in the future. Remind your chairs and award committees about available funds. Departments should spend the payout and reinvest any excess when possible. Be sure to use the payout according to the language in the gift agreement. When reporting usage for stewarded funds, provide details about the usage, the more the better and add individual recipients to each fund. For any unused funds, specify a reason and for funds to be awarded after the reporting deadline, include a note indicating when the awards will be made and remember to follow up.

Adding a steward comment to recipient is very important. Many faculty and students are unaware of the sources of their funding; providing details to them can prevent confusion. Adding a steward comment to the Foundation is a way to provide us with additional information about the

recipient or award that can help us as we put together our reports. When finalizing the information, set a calendar reminder to go back and add any additional information for funds that were not awarded before the initial reporting deadline.

**Finance Announcements:**

- Complete your source deactivations. The original deadline for this was March 31st, so please finish these up as soon as possible.
- Central campus has now loaded half of FY20 F&A balances. The other half will load at year end, and FY21 balances are expected to carryover as normal. If you have any questions or issues, please reach out to your budget analyst.
- Spending restrictions for meals/food (aside from travel) remain in place both within CAS and at the campus level. Exceptions are typically limited to trust funds that specifically envision food purchases in their gift agreement or as part of the fees collected. Reach out to the AD of Finance and your SAD for any other exception requests.

**HR Announcements:**

- No HR announcements this week.

**Campus Working Group Report Outs:**

- No campus working group updates were reported.