



## College of Arts & Sciences Managers' Meeting

Wednesday, December 14, 2022

10:30 a.m. – 12:00 p.m.

[Zoom Recording](#)

**Welcome:** Elizabeth Bakanic, Associate Dean for Finance & Budget Management

**Guest Speaker:** Joe Williams, Senior Director, Benefits, Leave Administration & Total Wellbeing

### **Who is eligible for Emeritus or Emerita Status?**

Any members of voting faculty that are retired and no longer performing any compensated services for the university, whether they are Tenured, Clinical research, Term, etc., they can continue to use their professional titles and distinctions. There have been courtesy designations in the past where a dean or department chair requested a particular faculty member to be designated as emeritus status who normally would not get that status.

### **What happens when a faculty member is designated as an Emeritus or Emerita?**

Eligible retiring faculty members get that automatic designation of emeritus, or they can request emerita (benefits can append that for them).

#### **Directory**

It moves them into what we call this retiree UNC Chapel Hill designation in the Campus Directory. Those who have this emeritus status will now say Emeritus UNC Chapel Hill in the Campus Directory.

#### **Amenities**

It is up to the individual departments and department chairs what they will provide, but this may include shared office space or another kind of access to services within the department- such as lab facilities, library corrals, parking privileges, and so on.

#### **Access**

They can get a new One Card at the Student Stores that have “retiree status” on it. Their ONYEN will remain active. They have a 10-year access period to their UNC email, which they can renew for another 10 years if they wish once the first period is up. They can also have access to recreational facilities (Campus Rec, for example) and discounted memberships at the UNC Wellness Center at Meadowmont. If they are an active member of the RAMS club at retirement, they can continue after retirement. They can also continue using SECU after retirement to access their account.

### **Retired Faculty Association**

This group started back in the 1980s, and they work through all things retired faculty, intellectual engagement, meeting together to discuss programs, lifelong learning activities, social activities, and more. It is a good organization that they can be a part of.

### **Faculty Elections**

A member of the voting faculty who retires is still eligible to vote on matters of faculty governance.

### **Timeline**

Typically, January 1 or July 1 are the dates of retirement for faculty, so the last day of the month before benefits will go in and put in the automated emeritus status, so the first day of retirement they typically have access to email.

### **[Faculty Retirement Planning Guide](#)**

**Emeritus (p. 28-30)**

## **Q&A**

### **What happens if a faculty member retires in a different month? (May 1 vs. July 1, for example)**

January 1 and June 1 retirements are the most popular for faculty because they are the end of the semester. There are occasional retirements that are not at end of the semester. The guidance is you must be working with your chair and your dean to make sure that things have been worked out, so the faculty member is not leaving in the middle of classes, or something like that, to retire. This is on that faculty member to ensure that they have the proper approvals.

Ashante discussed how Business Operations has gotten emails from benefits discussing a non-January or July retirement, and how Business Operations works with that specific department to process payments correctly. If they are a 9-month faculty member, their pay is already spread out over 12 months. In those cases, they must be paid for the month of June in a lump sum before we process their retirement. Resignation is different from retirement in this instance.

Do not panic if a faculty member says they are retiring in a non-July or January month, but somebody must communicate to Business Operations so they can make sure that the retiring faculty member receives their pay. It is challenging to pay someone once they are already off payroll.

**If the faculty retires and then gets an (unpaid) adjunct or teaching professor position to finish grants, this does not affect their emeritus status.**

## **Emerita Status**

Emeritus is a more gender-neutral term, so that is the default. If a faculty member would like to change their status, they can email benefits to get their Emeritus status changed to Emerita.

### **Retirement communication & retirement plans**

There is a communication that goes out for those that are eligible for phased retirement. There is not communication for broad eligibility for retirement because people are enrolled in different plans (TSERS vs. ORP) and it makes it much more difficult to send out eligibility letters.

If a faculty member comes to benefits and asks if they are vested, that becomes a case-by-case basis because then we must go back and look at payroll records to see how many years they have been working. In the ORP there is a provision that says if you're leaving before you're vested in the ORP, and you go to another college or university, and you enroll in a like retirement plan, then there's a potential that they can become vested on the UNC side by enrolling in that plan if it's their next job after leaving UNC.

If a faculty member is already in the UNC system and coming to UNC Chapel Hill, they cannot change plans as they have always had a choice of TSERS or ORP.

If a staff member is already in the UNC system and coming to UNC Chapel Hill and they were hired before staff had a choice of retirement plans, they will be able to choose to change plans if they would like to.

UNC Benefits can see an ORP database of how long they have been in the ORP system, but they cannot see any leaves (serious illness leave, unpaid leave, etc.) that would make the faculty member unvested, though it looks like they could be vested in the total number of years being in ORP.

### **Timeline for retirement**

TSERS has a minimum 90-day retirement, and ORP takes about 2 months to process, but the general rule is to start the process 3 to 4 months in advance of the date of retirement just to be safe.

### **Connect Carolina Leave Process**

In the past, when folks are going on leave, there is a plethora of paperwork required for each different type of leave. Rather than fax, mail, and physically drop off all this paperwork, it is all in one stop in Connect Carolina where people can upload their forms and go into one leave database.

The goal is to revamp the leave system for UNC, and this system is being built in-house for the benefits team to process leave requests much more efficiently.

**HR Announcements:** Ashante Diallo, Associate Dean, Human Resources

**REMINDER: Phased Retirement**

Keep an eye out for a phased retirement email this week and be sure to submit those actions in RASR. Do not submit them directly to the Senior Associate Dean, as they rely on the Business Operations team to review them first.

**ANNOUNCEMENT: Payroll lockout today**

Today is payroll lockout day. It can get a little sticky if you know you are going to be submitting actions, and you do not have enough approvers. So let your HRBP or HRC know that actions are going on, but you are not going to be in the office, but that you are going to be checking your email. If you have January 1st hires and you are still amid that, those are the ones that are a little trickier.

**REMINDER: I9 Open Houses before and after Holiday Break**

We do have a few I9 open house dates up until we leave for the break, and we have one on the first day that we return from the holiday break. Please be mindful of the I9 date.

If you have someone starting January 1st, they must have that section 1 complete on January 1, and section 2 complete by January 3<sup>rd</sup>.

**ANNOUNCEMENT: LMAR & Bonus Emails**

People have been inquiring about the bonus emails to EHRA staff and the labor market adjustment reserve increases that have gone out to some specific people in certain positions. In general, the questions were about why departments were not involved in decision-making- and mostly because it was not in our hands to make.

Eligible employees had salaries below 90% market rate, had to be on payroll by 6/30, and were permanent employees.

One Student Services Specialist- CTB in one department could not get their salary raised to 110%- every Student Services Specialist- CTB in the entire college had to go up to the same amount. It was all or nothing. If you had a position classification that was not fully state-funded, this made it trickier.

It is over \$300,000 of state salary dollars to the college that we did not anticipate which is a good thing.

There are some folks out there whom either did not receive a raise in salary because they were not here on 6/30- and we will have to make those changes in the future. They are allowing us to make changes on the back end. We will not get the funding from the State to do so, but we will do that.

**ANNOUNCEMENT: Central Office Communication**

Everyone in leadership is working hard to advocate and make changes- the Central OHR office is listening to us and our suggestions. If you have suggestions, send them to us. We do not see everything from where we sit. When we are talking to these folks in different central offices, we can say we have heard from our managers 70+ strong.

**Finance Announcements:** Elizabeth Bakanic, Associate Dean for Finance & Budget Management

**ANNOUNCEMENT: EHRA State Budgets Allocated**

Budget for the fiscal year 2023 legislative salary increase for State-funded EHRA employees has been allocated. Thanks for your patience as we completed that process. The EHRA salary savings report, in Sources, has also been updated with the new amounts and to reflect salary alignment instead of savings.

**ANNOUNCEMENT: January 1<sup>st</sup> Change in Grad Student Stipends**

You should now see funding for the stipend changes reflected in your Instructional Budgets.

The allocation was calculated by using the same FTE you originally allocated for the year X the new stipend amount, calculated for half a year (starting in January).

The Business Operations Finance team apologizes for the timing of this announcement from the Grad School, and the lack of communication from us in advance.

**ANNOUNCEMENT: NSF R&D Survey**

You have received the documents and anything you need to fill those out, and they should be turned in by the end of next week (**December 23**). Your contacts for this would be Kimberly Hatfield or Lindsay Gangl.

Thank you to those that are using the cost code (CRDSURVEYX) to tag these expenses throughout the year. Using this cost code makes this process easier, and if it is used widely then the survey may be nonessential in the future except for verification.

You can still go back for the first 6 months of this year to update cost codes.

**ANNOUNCEMENT: CASBO Finance Team Survey**

This afternoon you should be receiving a survey from us about our financial services in CASBO. We want to get your feedback on how we are doing, what you think we could improve, and what we should do. We want to get your ideas and your concerns back to us so that we can calibrate our services. There are many multiple-choice answers, but many options to leave free-form comments.

It is only a 5 to 10 min survey. There are 2 sections: one for everybody, and another for units in shared services. We do hope each of you will answer that and spend some time on it.

**ANNOUNCEMENT: One-time E&T investment**

Details are being finalized now, but one-time E&T investments will be out to you soon. Ongoing and recurring investments are still under consideration and are hopefully going to go out early in the calendar year.

For anything technology related, please work with your OASIS team and Andy Lang to order compatible and quality products.

Anything facilities-related- furniture, chairs, carpet, painting, etc.- should go through Powell Marshall.

There were some large E&T requests for field trips- they were all varied and demonstrated that there needs to be some sort of framework for these trips. The Dean has designated a working group to work through what this will look like in the future. The working group will be lead by SAD Abigail Panter and will include faculty members from each division. This year, field trips will be a one-time investment until the working group produces a framework.

There is not going to be a second round of E&T requests for this year. If you have anything that comes up that is an emergency, contact Kate or Elizabeth, or the Department Chair can contact their SAD.

**ANNOUNCEMENT: Calculating Graduate FTE**

The Dean's Office is asking units to begin calculating graduate student appointment FTE based on the expected hours for the particular appointment instead of a set rate for all appointments in a unit.

As you are recording FTE, consider the hours worked per week required for this graduate appointment, and divide that by 40.

**Examples:**

20-hour appointment over 40 hours = .5 FTE

10-hour appointment over 40 hours = .25 FTE

30-hour appointment over 40 hours = .75 FTE

The graduate school does not have hard limits for hours worked (except for international students who are capped at .5 FTE). The guidance is essentially "consider the workload of your student."

**ANNOUNCEMENT: Meeting minutes and email communication are all [on the CASBO website](#)**

**[Email Communications](#)**

**[Meeting Minutes](#)**