



College of Arts & Sciences Managers' Meeting

Wednesday, April 10, 2024

10:30 a.m. – 11:30 a.m.

[Zoom](#)

Welcome: Ashante Diallo, Associate Dean of HR

We are welcoming Sujata Paudel who is the new department manager for English and Comp Lit, American Studies and MEMS. Sujata previously worked at Appalachian State University before joining UNC.

Erin Pelletier has accepted the associate department chair of business administration position with the Department of Psychology and Neuroscience and will be leaving her current role as department manager of Economics. Erin begins her new role on April 22nd.

Stewardship Presentation: Joanna Cardwell, Director of Donor Relations and Compliance, The Arts and Sciences Foundation

Stewardship Reporting

Each year the Arts and Sciences Foundation sends more than 1,000 customized stewardship reports to donors. These reports combine elements of the Sources App, College Annual Report and UNC's Davie database. Department managers are involved in this year-long process, starting when the endowment distribution report in the summer and wrapping up and the close of the fiscal year.

The Annual Cycle of Fund Stewardship

1. **Receive Distributions** (summer)
2. **Spend the Funds** (throughout the year)
3. **Report Usage** (March/April)
4. **Finalize Information** (by early July)

There are currently 1,091 donor established funds for stewardship and we only steward funds for which there is a living donor, honoree, or family member.

Deadlines for Stewardship Reporting

- April 11th – initial deadline to add faculty and student recipients.
- April 17th – system opens to faculty.
- May 3rd – initial deadline to add activities to funds.
- July 8th – add any outstanding usage information from May/June if reporting for full fiscal year.
 - Foundation’s reporting cycle is July 1st – June 30th.
 - It is preferred that departments report on the July 1st – June 30th cycle but can work with departments if that is not feasible.

Reporting Usage in the Stewardship Section of CAR

- Add individual faculty and student recipients to each fund using the “Add Recipient” button.
- Provide details about the usage and include as much information as possible.
- For unused funds, specify a reason (i.e. travel restrictions, or no students met criteria of fund).
- For funds that will be awarded after the initial reporting deadline, include a note in “Steward Comment to A&S Ftdn” indicating when the awards will be made and remember to follow up.

It is very important to provide as much detail as possible in these reports. Donors will often want to know why in the event their funds weren’t used, and we need to be able to provide them with detailed information. Steps such as this can help to inspire future support.

The stewardship presentation can be found [here](#).

If you have any questions for Joanna, she can be reached by [email](#) or by phone at 919-962-8342.

Cost Share Portal Updates: Andrea Walens, Director of Research Administration

OVCR has pushed out an update to the cost share portal that will allow all types of cost share requests to be made through the portal. Previously only mandatory cost share that required OVCR matching would utilize the portal.

General Information

Instructions for the cost share portal can be found [here](#). When creating a new cost share request, it is required to have started the IPF, but it does not have to be completed. When prompted about if the request is for a sponsored research project, the answer should always be yes. Once the IPF has been entered, the cost share portal will automatically load in project information. If cost sharing is mandatory, you must enter the correct cycle deadline into the portal. On non-mandatory projects, the deadline should be placed between submission and award.

Project Years

This section is where the change was made to allow non-mandatory requests to be submitted through the portal. As long as the entry for OVCR cash match is left at \$0.00 the approval will go to department level approval and deans’ office approval, skipping OVCR. Mandatory cost share projects will still need to enter the correct OVCR cash match value.

Attachments

Here is where supporting documents can be included in your request. The project's cost share budget and any other supporting documentation such as quotes from vendors should be uploaded in this section. This page was largely unchanged with the update and functions as it did previously.

Approving Departments

All approving departments are listed in the order by which the request will be routed. This page is a great way to verify that your non-mandatory cost share request is not being incorrectly routed to OVCR instead of directly to the department.

If you have any questions on the cost share portal, please reach out to the research administration team [here](#).

Finance Updates: Elizabeth Bakanic, Associate Dean of Finance

I'd like to announce that I have accepted a position with the provost office but will continue to help close out the year with the college during the transition. Folks are free to contact me with questions but should utilize your budget analyst or Joe Daley where possible.

Temp Teach Instructional Budget

An announcement went out about a week ago letting folks know that the instructional budget report was now available to view. This is the most variable part of the budget, and your new number may not look similar to what you have received in the past. This number can be affected by things such as growth in faculty, and a change in your credit hours. If you feel that you cannot make this number work, we encourage you to take steps to reduce spending. If this still is not feasible set up a meeting with your SAD and budget analyst to see if contingency funds can be added.

Trusts in Deficit

CASBO's accountant Sharon Cullipher will be reaching out to you or an accountant in your office about resolving trust deficits before year end. We would like to have these resolved before the end of May. Please keep an eye out for these communications and be responsive. If no response is received, we will look to resolve this on our own.

Salary Savings Collections

Budget analysts will be reaching out in the next few weeks about salary savings. These will be savings from grants, TCLs or ICLs entered in IWL. We will also be ensuring professorships have been charged correctly and state lines haven't been overcharged.

Concur Updates

Rebecca Spanos joined us a Tuesday's all accounting meeting to provide some updates and tips for using Concur. Our team prepared a summary of the meeting which can be found on the CAS Accounting Staff teams chat [here](#).

Starting on Monday, we will be transitioning to a dedicated service team with World Travel, Inc. Previously we had a delegated support team that was shared with other organizations. This change should speed up response times and improve accuracy. Additional agents will be added to our support team if volume exceeds their bandwidth.

Rebecca stated that travel services are also working to do away with web travel for guests and students and have everything run through Concur. No timeline was given for this, but we hope to hear more on this in the next year.

An AI system is being developed in Concur that can provide things such as estimated flight costs and hotel costs. This system will automatically input the data into your request. This is being tested now and will be rolled out to campus soon.

Linking to the CASBO Website

Please be sure to link directly to the CASBO website when posting items on department websites. All information on the CASBO site is regularly updated and we have had issues with old versions of forms circulating due to being posted on department websites. Avoid using google to find forms as well, old links can stick around on search engines for a long time due to the amount of clicks they have received.

Human Resources Updates: Ashante Diallo

Job Change Actions in RASR

We cannot initiate job change actions on current employees until after May 3rd. This applies to actions in RASR that are effective July 1st. We will begin processing these as soon as possible and will have all actions effective July 1st executed fully by June 30th.

Salary Issues on Promotion Letters

There have been questions about employees' old salaries being shown on promotion letters from the provost office instead of the salary associated with their new role. We want to remind everyone that the salary in the provost letter does not address any salary increases that are effective July 1st. This cannot be changed due to every school handling this process differently.

Salary Increases Related to Promotion

Salaries related to promotions from faculty will be changing from a flat rate raise to a percentage based raise. There is a minimum associated with the percentage based raises for faculty of eight thousand dollars. The deans office will be sending out a notice going over these changes.

Upcoming 3% LSI

We want to make sure everyone is aware that the upcoming LSI will be based on your base salary as of June 30th and will not take any July 1st changes into account. If anyone in your department has questions about this, please reach out to your HR consultant.

OHR Benefits Consultant

Many people have asked questions about retirement processes relating to benefits recently. CASBO does not have access to this information, and this will need to be handled through OHR. Please remind your faculty that they will still need to confirm their plans to retire with you. Joy will be sending out a reminder email informing everyone that our benefits and leave consultants from OHR are Morgan Morrison and Angela Easter. Their contact information is included below.

Morgan Morrison
HR-Benefits Consultant
Morgan_Morrison@unc.edu
(919) 445-1491

Angela Easter
Leave Administration Consultant
angela_easter@unc.edu
(919) 843-0405

If your faculty have questions about the process of leaving the university, many resources on this are available at the [leaving the university](#) website.

(Audience): Does the college typically send a letter to faculty who are promoted detailing their salary increase and promotion account?

(Ashante): This is not something that we currently do. This information is available in the [chair's manual](#) section of the CASBO website.

Performance Management

We are in the midst of performance management and wanted to let folks know that if you missed the self-assessment deadline there is still a chance to complete it. The portal will not be opening back up but you can submit a word document including the questions to your supervisor.

Supervisors currently have access to appraisals in Carolina Performance and we have started to see these be completed. Supervisors have until April 30th to complete these.

The [performance management website](#) has been updated and contains many useful links to things such as webinars and how to guides. We highly recommend you all check this out and share it with your department.

New Exit Interview Program

We have an official exit interview program found [here](#). This is in response to folks either not feeling comfortable with an exit interview or just not prioritizing completing one. There used to be three separate exit interview processes that have now been combined into one Qualtrics survey. Paper copies are also available for those that prefer this to digital.

TIM Update

Emails have been going out concerning the upcoming TIM update and we recommend everyone pay attention to those. It is important that you verify that your accruals are correct when the new system goes live next week. [Stephanie Curry](#) served on the committee for the update and is a good resource if you have questions.

END OF MEETING