

## Access to Individual Faculty Research Accounts Post-Retirement Policy

Written by: Bonnie E Miller  
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### Background:

In Fiscal Year 2018, the Office of The Dean in the Emory College of Arts and Sciences initiated the Voluntary Faculty Retirement Incentive Program. The intent of this Program is to support tenured faculty in the advancement of their scholarly research and their supervision of graduate students in the final stage of their academic career prior to retirement. Several faculty who participated in the Voluntary Retirement Program might require access to the current available balances to complete their research that is currently in progress.

### Overview:

The purpose of this policy is to state the guidelines regarding access to the available funds in a Retired Faculty Member's research account post-retirement.

### Eligibility:

Only **Tenure/Tenure-Track Faculty** in the Emory College of Arts & Sciences (ECAS) who have received Emeritus Status approved by the Emory University Board of Trustees.

### Accessibility:

The Retired Faculty Member will have access to their respective research account for ***up to three years or when the account reflects a zero (\$0) balance after the effective date of retirement, whichever comes first.*** Note that Charles Howard Candler (CHC) Distinguished Professors, which are funded by the University, maintain access to their CHC designated accounts for up to five years.

### Allowable Expenses:

The available funds in the faculty research account can be used for research and professional development per Emory University Policy. Equipment purchases of any kind, including but not limited to, computers, laptops, tablets, cellphones, are unallowable.

ECAS Emeritus faculty must work directly with their respective department or tenure home for allowable purchases and/or expense reimbursements.

Note: ECAS Emeritus faculty are not eligible to obtain an Emory University Purchasing/Procurement Card (P-Card) or an Emory University Corporate Card.

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### Roles and Responsibilities:

**Emory College Office of the Dean:** Nominates Retired Faculty Member for Emeritus Designation to the Emory University Board of Trustees.

**Emory University Board of Trustees:** Reviews and provides final determination regarding Emeritus Designation.

**Emory College Departments:** Provides fiscal review and management of the faculty research account per Emory University and Emory College Policies. Primary contact with the retired faculty member for all matters regarding the faculty research account.

**Emory College Finance Administration:** Conduct periodic reviews of the respective retired faculty member's research account balance. Request Chartfield inactivation when the account reaches a zero (\$0) Non-Sponsored Project Balance and Fund Balance.

### Definitions:

**Retired Faculty Member:** A faculty member who has officially retired from the Emory College of Arts & Sciences.

**Tenure/Tenure-Track Faculty:** Full Professors, Associate Professors, and Assistant professors seeking to be promoted to Associate Professors.

**Faculty Research Account/Faculty Discretionary Account:** A Non-Sponsored Project (NSP) assigned to the respective faculty which contains funds for research and professional development.

#### **Emeritus Designation:**

A retired member of the faculty who has reached age fifty-five and has served as a member of the Emory faculty for at least ten continuous years, and whose total age and years of continuous service equal at least seventy-five, may be considered for an "emeritus" title that reflects rank and appointment track at the time of retirement.

**Emory Purchasing/Procurement Card (P-Card):** A secondary method for obtaining good and services. The P-Card is for use by active faculty and staff for low dollar purchases (\$1,499 and less) otherwise not available through Emory's contract suppliers. The card should also be utilized for recurring small dollar departmental charges. Refer to Emory University Policy 2.121-Strategic Procurement Policy.

**Emory Corporate Card:** A secondary method payment method. The Corporate Card is the preferred payment method for local business expenses and travel-related charges, such as hotel, airfare, and rental car costs. The applicant must be an active regular and permanent Emory employee in good standing at the University and paid on the University payroll. Refer to Emory University Policy 2.128.1.1-Visa Corporate Credit Card.

**Related Information:**

[Emory University Policies](#)

[Emory University Procurement Card](#)

[Emory University Corporate Card](#)

[Emory Commodity Matrix](#)

[Emory University Office of the Provost](#)