

# Procedures

## RETIRED UNBC FACULTY – ACCESS TO UNIVERSITY SERVICES AND RESOURCES

**Number:** AS 1.1  
**Classification:** Academic and Students  
**Procedural Authority:** Provost  
**Procedural Officer:** Deans and Director,  
Research and Innovation  
**Effective Date:** March 2021  
**Supersedes:** N/A  
**Date of Last Review/Revision:** March 2021  
**Mandated Review Date:** March 2028

**Parent Policy:** These Procedures are enacted under the following policies and procedures: [Adjunct Faculty Policy and Procedures](#); [Bestowal of the Title Professor Emeritus/Emerita Policies and Procedures](#); [Office, Research, and Storage Space Policy](#); [UNBC Faculty and Staff Email Policy](#); [Surplus University Assets Policy and Procedures](#); [Purchasing Policy](#); [UNBC Procurement Card Guidelines](#); [Travel Authorization Policy and Procedures](#); and [Travel Reimbursement Policy and Procedures](#).

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## 1.0 PURPOSE

These procedures provide details about UNBC's services and resources faculty may be able to access upon retirement.

## 2.0 SCOPE

- 2.1 These procedures apply to all retiring UNBC Faculty members.
- 2.2 Faculty who require continued affiliation with the University upon retirement should work with their Dean immediately once their decision to retire has been finalized to determine the services and resources they qualify for and need, and to apply for Adjunct Faculty status. Delaying these actions could cause an interruption to services and resources available to retiring faculty members.
- 2.3 For clarity, each reference herein to a Dean also includes the Head of the Division of Medical Sciences to the extent appropriate in the context.

## 3.0 DEFINITIONS

- 3.1 **Academic Administrative Unit** (definition from the [Degree Program Reviews Policy](#))

An Academic Administrative Unit is an academic program, department or school comprised of one or more degree programs.

- 3.2 **Adjunct Faculty** (definition from the [Adjunct Faculty Policy and Procedures](#))

Adjunct faculty appointments are given by the Provost and the Vice President, Academic to those who are not otherwise employed directly by the University, and who are not otherwise receiving any form of compensation from the University; therefore, they are not counted in staff or faculty FTE reports.

Adjunct Faculty are generally external to UNBC and may or may not be funded or employed by outside sources and are excluded from the Faculty Association, Academic Services, and all other employee groups at the University. An Adjunct Faculty could apply to granting agencies for funding if

he/she meets the agency's eligibility criteria as a Principal Investigator, following the approval of the head of the unit, the Dean and the Vice President, Research and Innovation.

**3.3 Professor Emeritus/Emerita** (definition from the [Bestowal of the Title Professor Emeritus/Emerita Policies and Procedures](#))

A title bestowed upon a retired Faculty Member who normally holds the rank of full professor; has a reputation as a scholar, in research and publication, which gives him/her international status, and has served on national or international committees and boards in the appropriate discipline; whose scholarly work has advanced his/her discipline at the national and/or international level; has a successful record as a teacher; and has contributed fully to the university through service on committees and otherwise.

## 4.0 PROCEDURES

The following procedures outline the services and resources Faculty members may be able to access upon retiring from the University. Access to services and resources depends on the Faculty member's affiliation with the University. Any services or resources the University offers to retired Faculty are privileges that require the approval and the continued support of the appropriate unit.

The Academic Administrative Unit that the retired Faculty member is affiliated with is responsible for all costs and fees associated with the services outlined below. In the case of research-affiliated activities, the Office of Research and Innovation is responsible.

### 4.1 Upcoming Retirement Notification

Upon the Faculty member's confirmed decision to retire, Human Resources contacts the following departments to notify them of the upcoming retirement:

- Academic Administrative Unit associated with the retiring Faculty member
- Information Technology Services
- Contracts and Supply Chain Management
- Dean's Office
- Distribution Services
- Facilities Management
- Finance Department
- Office of the Provost and Vice President, Academic

- Office of Research and Innovation
- University Library

## 4.2 Information Technology Services (ITS)

### 4.2.1 Computer and Email Accounts

- Upon retirement, faculty who no longer maintain an affiliation with the University (as either Adjunct or Professor Emeritus/Emerita) have
  - their email account converted to only allow access via a web-based interface (currently [owa.unbc.ca](http://owa.unbc.ca)). Access by any other method or email protocol is disabled; and
  - their computer account changed prohibiting the individual from accessing computers on campus and remotely via remote connectivity systems.
- Computer and email accounts for UNBC Faculty whose status changes to Adjunct Faculty upon retirement remain active once HR updates their status in Banner. The status of Adjunct Faculty is subject to periodic reviews to confirm access to their computer account is still valid.
- Computer and email accounts for Professor Emeritus/Emerita remain active once HR updates their status in Banner until the user is deceased.
- To ensure email and computer accounts are maintained in the system, all users, including Adjunct Faculty and Professor Emeriti, must log into their account at least once a year.

### 4.2.2 Personal Drive and Shared Drive Space Access

- The University does not delete Personal H:\ drives or its content on an individual's last day of employment.
- ITS can back up personal H:\ drive content at the request of the retiring Faculty member on their personal media device (USB drive or other such media) and give them the device.
- Upon retirement, Faculty who no longer maintain an affiliation with the University (as either Adjunct Faculty or Professor Emeritus/Emerita) have their access to the personal H:\drive space and shared G:\ drive space conclude on their last day of employment.
- Access to personal H:\ drive space for UNBC Faculty whose status changes to Adjunct Faculty upon retirement is maintained and all content in the personal drive remains during the transition. Their access to shared G:\ drive space is rescinded and provisioned as needed upon the approval of the Dean or, in the case of research-affiliated activities, the Vice President, Research and Innovation.

- v. Access to personal H:\ drive space for Professor Emeritus/Emerita is maintained during the transition. Access to shared G:\ drive space is rescinded and provisioned as needed upon the approval of the Dean or, in the case of research-affiliated activities, the Vice President, Research and Innovation.
- vi. The ongoing annual license fees associated with access to personal and shared drives are the responsibility of the academic administrative unit or, in the case of research-affiliated activities, the Office of Research and Innovation.

#### 4.2.3 Computer and Mobile Equipment

- i. Retiring Faculty who maintain an affiliation with the University as Adjunct Faculty or Professor Emeritus/Emerita and are involved in UNBC research related activities are encouraged to keep the computers issued to them as UNBC assets until their research role at UNBC is complete. The Faculty Member contacts ITS, informs them of the upcoming retirement and their plan to continue at UNBC in research related activities.
- ii. Upon retirement, Faculty members who want to purchase their Capital Equipment Replacement (CER) or mobile equipment contact ITS early in the process and provide the UNBC asset number for the equipment that they want to purchase.
- iii. ITS determines the warranty, Purchase Order (PO) number issued for the original purchase, and the funding that was used for the purchase of the equipment and asks the Finance Department to calculate the buy-out cost.
- iv. Purchasing equipment can be denied for the following reasons:
  - a. the equipment is within the Capital Replacement cycle and is to be allocated to the employee filling the vacant position;
  - b. research grants do not allow it; or
  - c. the budget holder denies the request.
- v. Retiring Faculty members, who want to pay the buy out cost for the equipment, provide the Finance Department with the payment.
  - a. The retiring Faculty member collects and gives the equipment to ITS for a non-destructive data-wipe.
  - b. ITS can re-image the equipment with software that is appropriately licensed for that specific machine (Original Equipment Manufacturer license).
  - c. This service is normally completed within two weeks of when ITS is notified of the request.

- d. ITS and Distribution Services remove the equipment from the inventory list and mark the equipment as retired.
- e. Distribution Services reissues the computer equipment to the retiring Faculty member.
- vi. Failure to return the equipment to UNBC for proper processing and/or disposal is theft and is treated as such.

#### 4.2.4 University Telephone and Listing

- i. Upon retirement, Faculty members who no longer maintain an affiliation with the University (as either Adjunct or Professor Emeritus/Emerita) have their telephone number and listing rescinded on their last day of employment.
- ii. For retiring Faculty with Adjunct Faculty status and Professor Emeritus/Emerita status who are involved in Graduate Supervision or Research, a University Telephone and Listing may be issued upon the approval of the Dean or, in the case of research related activities, the Vice President, Research and Innovation.
- iii. Any associated costs are the responsibility of the academic administrative unit, or, in the case of research related activities, the Office of Research and Innovation.

#### 4.2.5 Mobile Phone Number

- i. Faculty members retiring from the University who have and want to keep their UNBC mobile phone number, must contact ITS as early as possible during this process and provide ITS with the mobile phone number.
- ii. ITS contacts the mobile service provider, and the phone number is released from UNBC's corporate account. A note is placed on the mobile account about the action taken.
- iii. ITS contacts the retiring Faculty member and ask them to follow up with the mobile service provider.
- iv. The retiring Faculty member contacts the mobile service provider and either transfers the account to a personal account or transfers the number to an alternate service provider. The retiring Faculty member is responsible for all associated costs.
- v. Retiring Faculty with Adjunct Faculty status and retired Faculty with Professor Emeritus/Emerita who have and continue to need their UNBC mobile phone number for UNBC Research related activities, must contact ITS and the Office of Research and Innovation as early as possible during the process and provide the mobile number. Upon the approval of the Vice President, Research and Innovation, costs associated to the mobile account are the responsibility of the retired Faculty Member through grants.

vi. Retiring Faculty with Adjunct Faculty status and retired Faculty with Professor Emeritus/Emerita status who do not have a UNBC mobile phone number but need one for Research related activities, must contact the Office of Research and Innovation. If the Vice President, Research and Innovation approves the account, all costs associated with the creation and maintenance of the mobile account are the responsibility of the Faculty Member through grants and the future termination the mobile account is the responsibility of the retired Faculty Member.

#### 4.2.6 Other Information Technology Services

Requests for other information technology services, for example access to licensed software, for retiring or retired Faculty with Adjunct Faculty status or Professor Emeritus/Emerita status are handled case-by-case.

### 4.3 Identification Numbers and Cards

4.3.1 Upon retirement, faculty who no longer maintain an affiliation with the University (as either Adjunct or Professor Emeritus/Emerita) have their University accounts closed and their UNBC ID number and card are no longer valid.

4.3.2 Once the University accounts of retired Faculty with Adjunct Faculty or Professor Emeritus/Emerita status are activated or re-activated, they receive their UNBC ID number and card.

4.3.3 Once ID cards are issued, the retired faculty with Adjunct Faculty or Professor Emeritus/Emerita status can access the photocopiers and Library services and resources.

### 4.4 Library Services

4.4.1 Upon retirement, all faculty can continue to access Library services and resources upon request when they go to the Library with the *Exit Checklist for Faculty Association Members Leaving the University* to clear their library accounts upon their departure.

4.4.2 Upon status verification, the Library issues retiring faculty who no longer maintain an affiliation with the University (as either Adjunct or Professor Emeritus/Emerita) a generic library card and writes Retired Faculty on the card.

- i. Faculty are advised their library account expires in five years on September 30, and the account is renewable.
- ii. The retired faculty member is responsible for informing the Library if their address or contact changes during that time.

4.4.3 Retired Faculty with Adjunct Faculty or Professor Emeritus/Emerita status are issued UNBC ID Cards once their University accounts are

activated or re-activated. These ID Cards are used to set up Library accounts.

#### 4.5 Mail Delivery

- 4.5.1 Distribution Services forwards all mail received for retired faculty, no matter their status, to the academic administrative unit they are associated with.
- 4.5.2 Upon retirement, faculty who no longer maintain an affiliation with the University are to make arrangements with their Academic Administrative Unit as to where mail should be forwarded.
  - i. Academic Administrative staff make a single attempt to notify the individual to pick up their mail or confirm a forwarding address using the most recent contact information available.
  - ii. Any mail that is not collected after six months from the date the mail is received by the Academic Administrative Unit is shredded.
- 4.5.3 Any mail UNBC receives for retired faculty who maintain an affiliation with the University, is held by the academic administrative unit until the retired faculty member picks it up.

#### 4.6 Office, Research, Laboratory and Storage Space

- 4.6.1 Upon retirement, access to office, research, laboratory and storage space for faculty concludes on the last day of employment.
- 4.6.2 Access to swing/shared office space for retired Faculty with Adjunct Faculty or Professor Emeritus/Emerita status may be considered based on need and availability and requires the approval of the Dean. The need for space is evaluated and assigned on a term-by-term basis.
- 4.6.3 Access to office space for graduate students supervised by a retired Faculty with Adjunct Faculty or Professor Emeritus/Emerita status may be considered based on need and availability and requires the approval of the Vice President, Research and Innovation.
- 4.6.4 Access to office, research, laboratory or storage space for retired Faculty with Adjunct Faculty or Professor Emeritus/Emerita status involved in research related activities may be considered based on need and availability and requires the approval of the Vice President, Research and Innovation.
- 4.6.5 A [Space Allocation Request Form](#) must be completed for all office, research and laboratory space requests in all University Buildings and must be vetted through UNBC's Space Allocation Committee.

- 4.6.6 All space allocation agreements for retired Faculty with Adjunct Faculty or Professor Emeritus/Emerita status must be for a specified period. At the end of this agreed period, the use of the space is reviewed by the Dean or Vice President, Research and Innovation if further time is requested and may be renewed by the Dean or the Vice President, Research and Innovation based on research activity, space availability and intensity of use.
- 4.6.7 When access to office, research, laboratory and/or storage space concludes, it is the responsibility of the academic administrative unit the retiring faculty member or the retired faculty member with Adjunct Faculty or Professor Emeritus/Emerita status is associated with, or the Office of Research and Innovation when the space has been used for research related activities, to request a move through the Facilities Management [WebTMA Service Request](#) system.
- i. Facilities Management contacts the person(s) being moved to determine the scope of work and potential move dates.
  - ii. For research laboratory space being vacated, the retiring faculty member or the retired faculty member with Adjunct Faculty or Professor Emeritus/Emerita status completes and submits the [Vacating Research Lab Form](#).
  - iii. Facilities Management is responsible for moving furniture and equipment.
  - iv. The retiring faculty member or retired faculty member with Adjunct Faculty or Professor Emeritus/Emerita status is responsible for ensuring all personal and research related materials are packed up and removed from the space. Facilities Management is able to assist in moving these boxed materials upon request.
  - v. If personal or research related materials are left in the vacated space, the associated academic administrative unit, or the Office of Research and Innovation in the case of research related activities, is responsible for ensuring the materials are packed up and for reaching out to the person through their last known contact information and address to notify them of the found materials.
  - vi. Once contact and the identity of the person have been confirmed, the person is asked what they want done with their items.
  - vii. If six months have passed since the space was vacated and the academic administrative unit or the Office of Research and Innovation has not been able to contact the person after reasonable attempts, the materials are destroyed.

#### 4.7 Business Cards

- 4.7.1 Access to business cards for retired Faculty with Adjunct Faculty or Professor Emeritus/Emerita status is considered based on need and requires the approval of the Dean or, in the case of research related activities, the Office of Research and Innovation.
- 4.7.2 A [Business Card Order Form](#) must be completed and submitted to Contracts and Supply Chain Management.
- 4.7.3 All costs associated with the purchase of the business cards are the responsibility of the Academic Administrative Unit or, in the case of research related activities, the Office of Research and Innovation.

#### 4.8 Travel

Retired faculty who travel on University related business (research or otherwise), are subject to UNBC's *Travel Authorization Policy and Procedures* and *Travel Reimbursement Policy and Procedures*.

#### 4.9 Research Contracts and Funding

- 4.9.1 Retiring faculty who hold research contracts and grant funding, and want to continue to be eligible to hold such contracts and funding, must contact the Office of Research and Innovation to convey their plans. They must also ensure they have applied for and are granted Adjunct Faculty status before their last day of employment.
- 4.9.2 Retiring faculty who hold research contracts and grant funding, and no longer want to maintain such contracts or funding upon retirement, must contact the Office of Research and Innovation to work out an action plan to ensure the research is concluded or transferred to another faculty member by their last day of employment at UNBC.
- 4.9.3 Retiring faculty intending to become Adjunct faculty who have residual, non-expiring research funds should consult with the Office of Research and Innovation about the implications to retaining other privileges and services.

#### 4.10 Research Equipment

- 4.10.1 Upon retirement, requests for access to research equipment by Adjunct Faculty and Professor Emeritus/Emerita involved in research related activities can be made in writing to the Vice-President, Research and Innovation.
- 4.10.2 Upon retirement, Faculty members who want to purchase their research equipment contact Office of Research and Innovation early

in the process and provide the UNBC asset number for the equipment that they want to purchase.

- i. The Office of Research and Innovation determines the warranty, Purchase Order (PO) number issued for the original purchase, and the funding that was used for the purchase of the equipment and asks the Finance Department to calculate the buy-out cost.
- ii. Purchasing research equipment can be denied for the following reasons:
  - a. the equipment is within the Capital Replacement cycle and is to be allocated to the employee filling the vacant position;
  - b. research grants do not allow it; or
  - c. the budget holder denies the request.
- iii. Retiring Faculty members, who want to pay the buy out cost for the research equipment, provide the Finance Department with the payment.
- iv. Failure to return the equipment to UNBC for proper processing and/or disposal is theft and is treated as such.
- v. The Office of Research and Innovation and Distribution Services remove the equipment from the inventory list and mark the equipment as retired.
- vi. Distribution Services reissues the research equipment to the retiring Faculty member.

4.10.3 Research equipment purchased with professional development funds belong to the University. If retiring faculty or retired faculty with Adjunct Faculty or Professor Emeritus/Emerita status want to keep this equipment, they need to buy out the equipment as outlined in section 4.10.2 of these *Procedures*.

#### 4.11 University Procurement Card

4.11.1 Upon retirement, faculty who have a university procurement card must return the card to Contracts and Supply Chain Management and submit the reconciliation and outstanding receipts to the Finance Department.

4.11.2 Retired faculty with Adjunct Faculty or Professor Emeritus/Emerita status who hold research grant funding at UNBC may be eligible for a procurement card.

4.11.3 It is the responsibility of the Office of Research and Innovation to determine if a retired faculty member with Adjunct Faculty or Professor Emeritus/Emerita status requires the continued use of the procurement card or the authorization of a new procurement card.

4.11.4 Retired faculty with Adjunct Faculty or Professor Emeritus/Emerita status who have a university procurement card, require access to FAST Reporting.

4.11.5 All costs associated with the procurement card are the responsibility of the Office of Research and Innovation.

#### 4.12 Professional Development Funds

4.12.1 Professional development funds expire upon the retirement of faculty; therefore, retiring faculty are encouraged to use their professional development funds before their last day of employment.

4.12.2 Retiring faculty are encouraged not to purchase physical assets like computers or research equipment with their professional development funds, as these assets remain as the property of UNBC when they retire.

## 5.0 RETIRED FACULTY – ACCESS TO SERVICES AND RESOURCES CHECKLIST

The following services and resources are offered to retired UNBC Faculty with Adjunct Faculty or Professor Emeriti status as a courtesy with the approval of the appropriate unit.

### 5.1 Basic Services and Resources

Authorized upon the approval of the Dean for retired UNBC Faculty with Adjunct Faculty status  
 Authorized upon the approval of Senate for retired UNBC Faculty with Professor Emeriti status  
 Costs and/or fees associated with the service are the responsibility of the Academic Administrative Unit.

Service or Resource	Automatically Authorized Upon Appointment	May Be Authorized Upon Request. Subject to need, availability and/or funding.	Department Responsible for Implementing	Comments
Computer and Email Accounts	✓		ITS	
Personal H:\ drive	✓		ITS	
Shared G:\ drive		✓	ITS	
Computer and Mobile Equipment		✓	ITS	
University Telephone and Listing		✓	ITS	
Mobile Phone Number		✓	ITS	
Other IT Services (Please note the services required in the comments section)		✓	ITS	<input type="checkbox"/> VDI Access <input type="checkbox"/> VPN Access <input type="checkbox"/> SPSS Access <input type="checkbox"/> Other licensed software. Please specify _____
Identification Number and Card	✓		Cashier's Office	
Library Services	✓		Library	
Mail Delivery	✓		Academic Administrative Unit	
Swing Office Space		✓	Facilities	Authorized and issued by the Space Allocation Committee on the recommendation of the Dean.
Business Cards		✓	Contracts and Supply Chain Management	

### 5.2 Services Associated with Graduate Student Supervision

The following services are available to retired UNBC Faculty with Adjunct Faculty and Professor Emeritus/Emerita status who are involved in active graduate student supervision upon the approval the responsible Dean.

Costs and/or fees associated with the service are the responsibility of the Academic Administrative Unit.

Service or Resource	Automatically Authorized Upon Appointment	May Be Authorized Upon Request. Subject to need, availability and/or funding.	Department Responsible for Implementing	Comments
Office Space for Student		✓	Facilities	Authorized and issued by the Space Allocation Committee on the recommendation of the VPR.
Laboratory Space for Student		✓	Facilities	Authorized and issued by the Space Allocation Committee on the recommendation of the VPR.
University Telephone and Listing for Student		✓	ITS	

### 5.3 Services Associated with Research

The following services are available to retired UNBC Faculty with Adjunct Faculty and Professor Emeriti status who are actively involved in research upon the approval the Vice President, Research and Innovation.

Costs and/or fees associated with the service are the responsibility of the Office of Research and Innovation and the associated research funding.

Service or Resource	Automatically Authorized	May Be Authorized Upon Request. Subject to need, availability and/or funding.	Department Responsible for Implementing	Comments
Office Space		✓	Facilities	Authorized and issued by the Space Allocation Committee on the recommendation of the Dean (or VPR).

Laboratory Space		✓	Facilities	Authorized and issued by the Space Allocation Committee on the recommendation of the or VPR.
Storage Space		✓	Facilities	Authorized and issued by the Space Allocation Committee on the recommendation of the or VPR.
Office, Laboratory and/or Storage Space Keys		✓	Facilities	
Research Equipment		✓	Contracts and Supply Chain Management	
University Telephone and Listing		✓	ITS	
University Mobile		✓	ITS	
Travel		✓		
University Procurement Card and Access to FAST Reporting		✓	Contracts and Supply Chain Management	

