

SLCL- Disposition of discretionary funds upon retirement or resignation Updated 2024

This guidance spells out the rules set out by the office of the Provost that govern the funds in discretionary/local accounts that are created to support the work of individual faculty members. You can read the complete document “**Guidelines on the disposition of unspent discretionary funds held by retiring or departing faculty**” here: <https://provost.illinois.edu/policies/policies/>.

Please know that SLCL abides by the same guidelines stipulated by the Provost.

Regardless of the name used or the source of funds, research and discretionary accounts are University assets and the funds in them are provided to support an individual’s work as an active faculty member of the School of Literatures, Cultures and Linguistics and any of its units. Even though a faculty member is given decision-making authority for the expenditure of funds, the funds should be used to further the missions of the institution through the work of its faculty.

At the conclusion of Faculty appointment due to retirement or departure, any unspent local funds will remain with the departmental unit. Research and professional development local funds are normally not available for use by faculty members after they retire.

There are a limited set of occasions when a faculty member who has retired might still be engaged in university work, and it might be appropriate for research account funding to support that work. The judgment should be guided by the principle that these funds are to be used to further the University’s accomplishment of its missions. Please refer to the Provost document here: <https://provost.illinois.edu/policies/policies/>. In these cases, you are asked to consult with SLCL Director for input when considering these limited set of occasions. Finally, if there is a need to continue access to the account(s), depending on the types of funds that remain, and the source of those funds, a conversation with the College including Associate Dean of Humanities, will be needed. We will follow the order of funds to be used for any “leave behind obligations” as outlined in the Provost guidelines on page 1, section 2 and return funds to the original source as outlined in the same document.

Please keep in mind that it is the EO’s responsibility to meet with the departing faculty member to discuss these policies. As the Provost’s document states: “As soon as possible after units heads become aware of a faculty member’s intentions or plans to resign to take a position at another institution or retire, an accounting should be made of all “leave-behind obligations” (for example, support for students remaining here or postdocs and research staff who have existing employment contracts for which the campus is obligated, deficits in all accounts, etc.). A meeting should occur between the department head and/or business manager and the departing faculty member to go over all accounts, explain the university’s policies, and formulate a plan for the faculty member’s discretionary funds. In cases where the faculty member is working with a research institute outside the department, the institute should also be engaged in the conversation” (<https://uofi.app.box.com/s/rtvrj00m6bie1ievrpsosu5y09rfoyf>)