

EHRA Non-Faculty Position Analysis Guide

Purpose:

This guide is used to determine if a position meets an EHRA Non-Faculty Designation

Definitions and General Overview:

As a State entity, the University of North Carolina System is subject to the North Carolina Human Resources Act (the Act) and its various provisions. Based on principal job functions, some University positions are subject to the Act and are referred to as SHRA, while others are exempt from the Act and referred to as EHRA. There are two broad categories of staff positions exempt from the Act, which are: Instructional, Research and Information Technology (IRIT, formerly called Instructional, Research and Public Service, or IRPS) and Senior Academic and Administrative Officers (SAAO).

- IRIT positions are further divided into various subcategories based on job function.
- SAAO positions have multiple job titles and functional characteristics that define eligibility for this classification and are divided into two tiers
 - Tier I
 - Tier II

This guide provides details on the distinct subcategories and subtypes of EHRA Non-Faculty position classifications. Any non-faculty position that is proposed for EHRA status must meet the criteria for either IRIT or SAAO to be covered under the human resources policies established by the Board of Governors of the University of North Carolina System. This guide provides criteria established by policy and interpretations that are used to determine whether a position may be classified as EHRA IRIT or EHRA SAAO. In considering whether a position qualifies for EHRA status, an important consideration is whether the majority (e.g., 50% or greater) of the position's effort and principal functions satisfy the job content for an EHRA non-faculty position.

This is an assessment that must be supported by a written job description that summarizes the position's intended purpose and principal job duties, and describes the position's minimum and preferred education and experience. The constituent institution must maintain such a job description on file for every EHRA IRIT and SAAO position that is presently under recruitment or filled by a position incumbent.

IRIT General Criteria:

EHRA non-faculty IRIT positions support the core mission of the University by creating and disseminating knowledge through direct instruction, research, and public service, or performing professional-level duties that are integral to and uniquely supportive of that work. The official IRIT criteria, listed in UNC Guideline [300.2.5\[G\]](#), are summarized here for reference.

The incumbent in these positions must be substantially engaged in the regular academic, educational, research, information technology, or public service/extension activities of the University. Position incumbents should demonstrate professional expertise and discretion in determining the nature and content of the instructional-, educational-, research-, information technology-, or public service-related activities of the institution and be involved in evaluating the effectiveness of such activities, and/or feature significant and independent interaction with participants in the University's instructional, educational, research, or public-service programs. The ongoing job responsibilities for such positions must address one of the following:

- Engage in or be uniquely supportive of instruction, student success, and/or the direction or coordination of education or academic-supportive activities.
- Engage in or be uniquely supportive of original scholarship, creativity, or scientific research efforts, and the dissemination of such research/scholarship results (including dissemination through extension/public service). The ongoing job responsibilities must be involved with independent research design, implementation of research procedures, analysis of data, interpretation of research results, and/or dissemination of results through publication or public service.
- Serve in an FLSA-exempt information technology position within a UNC System EHRA Non-Faculty IT Professional classification. UNC System Office EHRA Non-Faculty Classification Guide * Page 4 of 11 * Revised August 2022
- Serve as a staff physician or staff veterinarian (without primary faculty rank), providing clinical healthcare services to human or animal populations.

Every EHRA position classified as IRIT must be associated with one of the IRIT subcategories listed below and meet the defined functional job criteria.

EHRA non-faculty IRIT positions generally require post-baccalaureate credentials (e.g., master's degree or higher), although a bachelor's degree plus alternative or equivalent professional training and experience may be substituted for the advanced degree on an exceptional basis. It is recognized that in some areas such as development, admissions, financial aid, and athletics coaching and athletics management, appropriate qualified candidates may hold baccalaureate rather than advanced degrees.

Additionally, for certain information technology positions, appropriate qualified candidates may hold a baccalaureate-equivalent combination of education and experience. Positions for which postbaccalaureate credentials are not generally required, or for which specific degrees or certification are required, have education and experience requirements listed below by IRIT subcategory.

IRIT Subcategories

Academic Advising & Assessment

Positions whose primary purpose is to advise students on academic matters such as selection of a major area of study, course selection, and academic performance. Such positions may include individuals who provide student testing and assessment as part of the academic advising process.

Academic Preparation & Enhancement

Positions whose primary purpose is to improve student academic preparation through such means as tutoring and supplemental instruction, or to direct programs designed to enhance the educational experience of enrolled university students or targeted secondary school students to help prepare them for post-secondary education. This includes positions focused on enhancing the academic preparation of “at-risk” student populations.

Academic Standards

Positions whose primary purpose is to develop and/or administer academic standards, curricula, and degree requirements for degree-granting programs.

Athletics Coaching and Athletics Management

Positions whose primary purpose is to coach student athletes for teams sponsored by the institution or to serve as trainers to student athletes, as well as senior-level professionals with institutional responsibility for student-athlete programs in compliance and major sports operations. Note: This category does not include equipment and facilities managers or positions ancillary to an athletics program. Minimum Education and Experience: Minimum of a bachelor’s degree required with experience in relevant independent instructional or educational activities; specific minimum experience is at the discretion of the Director of Athletics.

Audit, Business, and Finance

The University recently received statutory authority to apply EHRA non-faculty status to Audit, Business, and Finance positions that are exempt from the (FLSA) and have at least one-third of their duties performing professional accounting duties. Classifications within this subcategory include:

- Accountant I, II, III
- Accounting Manager I, II, III
- Auditor I, II, III
- Audit Manager I, II, III
- Business Officer I, II, III
- Business Manager I, II, III
- Finance & Budget Analyst I, II, III
- Finance & Budget Manager I, II, III

In addition to a FLSA exempt status, any SHRA classification with one of these titles will be required to have at least one-third of their job duties reflected as professional financial, accounting, budgetary, and/or financial aspects of sponsored research administration – i.e., grants in order to be eligible for the new EHRA

classification. Resources for the EHRA Audit, Business and Finance Professionals classifications, including definitions and leveling information, can be found at: <https://myapps.northcarolina.edu/hr/class-comp/classification/>

Certified Law Enforcement

The NC General Assembly has provided an exemption from the Human Resources Act for sworn law enforcement officers. Classifications within this Certified Law Enforcement subcategory include:

- Police Officer Trainee
- Police Officer
- Master Police Officer
- Police Supervisor
- Senior Police Supervisor
- Police Commander
- Police Executive I (SAAO Tier II if serving as Agency Head or Deputy Agency Head)
- Police Executive II (SAAO Tier II if serving as Agency Head or Deputy Agency Head)
- Police Executive III (SAAO Tier II if serving as Agency Head or Deputy Agency Head)

The legislatively authorized EHRA authority for campus police differs from our standard EHRA nonfaculty employment policies in that it permits the University to classify and compensate these positions as EHRA non-faculty employees, but also preserves many of the traditional job protections afforded to SHRA employees. Any impacted employees will retain many of the features of “career status” and will not be “at-will” EHRA employees. Resources for the Certified Law Enforcement Professional classification, including definitions and leveling information, can be found at: <https://myapps.northcarolina.edu/hr/hr-professionals/hrprofessional-networks/comp-network/> UNC System Office

Continuing Education

Positions whose primary purpose is to design and deliver courses, seminars, etc., that extend the institution’s regular academic and research activities to non-degree-seeking participants through targeted programs and short courses. This classification is used for instructors of non-credit courses only.

Cooperative Education

Positions whose primary purpose is to develop cooperative or internship education experiences for students with employers, monitor student progress and learning, and evaluate student performance. Such positions either have direct impact on grade assignment or are featured as an integral component of the institution’s student career services activities.

Counselors

Positions requiring credentialed professionals whose primary purpose is to provide clinical and developmental counseling or psychological services to students to enhance their psychological growth, emotional well-being,

and learning potential. Minimum Education and Experience: Relevant professional degree and licensure in the appropriate clinical field of psychology, social work, or mental health.

Information Technology Professional

The 2017 Appropriations Act of the NC General Assembly provided an exemption from the Human Resources Act for certain information technology professionals. This subcategory is for certain positions whose primary purpose is to provide professional-level information technology services. Such positions must be exempt from the Fair Labor Standards Act (FLSA). Classifications within this subcategory include:

- IT Analyst/Programmer
- IT Architect/Engineer
- IT Auditor
- IT Business Intelligence/Data Analyst
- IT Business Systems Analyst
- IT Client Support Manager
- IT Database Administrator
- IT Instructional/Class Support Professional
- IT Manager • IT Network Administrator
- IT Project Manager
- IT Security Professional
- IT System Administrator
- IT Web Designer/Developer

Resources for the IT Professional classification, including definitions and leveling information, can be found at <https://myapps.northcarolina.edu/hr/download/259/ehra-it-implementation/4782/ehra-it-classification-definitions-and-leveling-rev-07-13-2018.pdf>

Minimum Education and Experience: Relevant baccalaureate or post-baccalaureate degree, or equivalent combination of education and experience, dependent upon level of responsibility and authority. Constituent institutions should adhere to minimum education/experience requirements published for tiered IT levels I, II, and III.

Institutional Research & Assessment Management

Positions whose primary purpose is to direct and manage institution-wide data, metrics, and management information about the institution's students, faculty and staff, enrollment and academic programs, facilities, and related items as required for federal, state, and UNC system reporting. Directly supports the institution's planning and assessment processes. This category may be used for campus wide roles or those who direct institutional research and assessment within a large School or College. Note: This is not intended for analysts or other institutional research roles that do not have director level responsibility.

Instruction

Positions whose primary purpose is to determine course content, teach, and evaluate enrolled students in courses for academic credit that are not assigned primary EHRA faculty status and rank.

Instructional Consulting

Positions whose primary purpose is to assist, advise, and critique faculty and other instructional staff on matters such as course content, curriculum structure, and instructional technique. This includes positions involved in transitioning coursework from traditional classroom to online distance learning formats. This category is not to be used for individuals who provide routine information technology support within the instructional enterprise.

Laboratory Management

Positions whose primary purpose is to manage research and experiential laboratories and participate in design and selection of experiments, protocols, and procedures that best support the instructional or research goals and in evaluating progress towards goals.

Physicians and Dentists

While defined separately under NC General Statute 126-5(c1)(8), positions that require meeting the licensing standards for physicians and dentists in the State of North Carolina will be classified as IRIT. Note: This category is used for positions not otherwise assigned primary EHRA faculty status and rank.

Professional Librarians

Positions whose primary purpose is to support the institution's instructional and research activities by advising students and faculty on the selection and effective use of library resource materials and by working with faculty on instructional and research matters such as collection development. Used for professional librarians who are not assigned EHRA primary faculty status and rank. Minimum Education and Experience: Requires the Master's in Library Science (MLS) degree. In specialized libraries, may substitute an advanced degree in the field of specialization (e.g., legal degree for a law library, or a history degree for a special historical collection within the library setting).

Note: At UNC Charlotte, all Librarian positions are Faculty Administrators and managed through Academic Affairs.

Public Service & Extension

Positions whose primary purpose is to provide the direct delivery of scholarship and research to public audiences and clients and/or to direct staff or programs in the development and administration of such programs, which focus or extend the academic resources and/or research products of the institution on addressing community and regional issues and incorporate community needs in the institution's academic and research programs, including agricultural extension and industrial extension.

Research Administration & Compliance

Positions whose primary purpose is to direct and administer the programs and staff of major externally funded research projects; serve as the chief administrative manager and compliance officer for a large academic department or research center with substantial administrative and financial complexity and which derives a significant portion of its operating budget from sponsored research funding sources; or positions that provide executive leadership of sponsored research activities either campus-wide or within a school/college dean's office. The latter includes individuals who manage project proposals in compliance with the institution's academic and research policy, provide substantive professional advice on the development of project proposals, and negotiate with sponsoring agencies with regard to the terms and conditions that govern the conduct of sponsor research. Note: These positions do not include first-level contract and grants developers, grant writers, or administrative support.

Research and Clinical Professionals

Positions whose primary purpose is to serve as non-faculty principal investigators, research project managers, research scholars, research scientists, or research assistants/associates for primary or secondary research projects that may advance or enhance a field of academic learning. This includes licensed clinicians who deliver research demonstration outcomes or who provide direct clinical services to clients in an academic healthcare environment. These positions function with substantial independence and expertise in original scholarship, research design, research engineering, implementation of research procedures, data analysis, and interpretation of results. Research computing professionals whose principal duties involve the exercise of substantial research independence and creativity in discovering new or emerging technologies may also be considered for this category as distinguished from individuals who are operating or supporting existing, well established information technologies.

Note: These positions do not include operational or support-related positions. Minimum Education and Experience: Relevant post-baccalaureate degree required; for candidates demonstrating comparable independent research productivity, will accept a relevant undergraduate degree and three or more years of relevant experience in substitution. May require terminal degree and licensure.

Student Support Services

Positions whose primary purpose is to develop, direct, and administer services for students and/or faculty that have a direct impact on the students' educational experiences and/or campus life (e.g., student career services; student life/student housing; student honors programs; student diversity support programs; student conduct; student registration and records). This category also includes student admissions and financial aid positions that exercise decision-making authority on behalf of the institution (e.g., admissions officers, financial aid officers) and professional staff who design and deliver programs and instruction that involve direct interaction with students and enhance their academic and learning experiences outside the classroom setting. Note: These positions do not include operational or facility maintenance functions.

Technology Transfer

Positions whose primary purpose is to manage the flow of research and technology innovation, disclosures, patents, trademarks, copyrights, and other aspects of technology transfer. These positions include professional staff members who assess disclosures for technical and commercialization merits; develop relationships with industry or government clients; negotiate business transactions for the exchange of intellectual property rights; collaborate with regional and state economic development agencies; and/or engage in other aspects of technology transfer such as negotiating licensing or equity agreements. These positions also provide outreach services such as training and education to institution faculty and students in related activities.

SAAO General Criteria

Positions qualifying for designation as Tier I SAAOs are characterized by the following job titles:

- Chancellor
- Executive vice chancellor
- Provost
- Vice chancellor
- Dean
- Directors of major administrative, educational, research, and public services activities of the University designated by the Board of Governors

The remainder of senior officer positions qualifies for designation as Tier II SAAOs and includes the following job titles and/or principal functions:

- Senior associate, associate, and assistant vice chancellors.
- Vice, senior associate, associate, and assistant provosts.
- Vice, senior associate, associate, and assistant deans. This includes senior leadership positions in administrative divisions within academic units (e.g., Assistant/Associate Dean for Finance, Assistant/Associate Dean for Human Resources, etc.). Each administrative division within an academic unit is limited to one Tier II leadership position.
- Professional members of the chancellor's staff such as assistant to the chancellor, special assistant to the chancellor, special advisor to the chancellor, chief of staff to the chancellor, and secretary of the university.
- A position that provides administrative direction of separately designated divisions or departments of institutional activity (e.g., campus-wide offices) uniquely associated with institutions of higher education or that serve as a principal deputy to such a position. These positions are characterized by active, continuing involvement in formulating, interpreting, and implementing institutional policy and exercising substantial independence of administrative authority and discretion in areas such as program planning and design and allocation of resources. In the instance of a "principal deputy," these positions generally fall within offices with significant campus-wide responsibility and scope and there is only a single "principal deputy" designated within the defined work unit.

Unless otherwise noted below, SAAO positions must require a relevant post-baccalaureate degree with a minimum of three years or greater of related professional experience, although substantially greater amounts of professional experience are typical and often required for highly-compensated SAAO-I roles. In cases where potential candidates may have comparable professional backgrounds without the advanced degree, the post-baccalaureate requirement may also mention that a relevant undergraduate degree along with any substantially relevant experience may be substituted for the advanced degree. A general approach to applying experience requirements to a Master's degree is to consider 5-7 years relevant experience for Director level roles; 7-10 years relevant experience for Assistant or Associate Vice Chancellor roles; and 10+ years relevant experience for most SAAO-I roles. Again, these requirements should scale upwards depending on the scope of the role, the budgeted salary, and the assigned duties.

Other SAAO Subcategories

Communications & Marketing Directors

The position incumbent must be at the director level, have responsibility for marketing the institution and its programs or services to external audiences, and must supervise one or more staff within the communications/marketing function or unit. These positions must direct the full range of strategic marketing/communication activities for the unit in question. Marketing assistants, graphic artists, writers/editors, webmasters, and other professional-level communications and marketing specialists who only have responsibility for a specific segment of the communications function as opposed to the broader scope of communications responsibilities and/or do not meet the organizational reporting criteria specified above do not qualify for SAAO status. In addition, the position must perform these duties at an institutional level (e.g. University Affairs), at a school-wide level residing in the immediate office of a Dean, or at a freestanding university center that is revenue-supported.

Minimum Education and Experience: Relevant post-baccalaureate degree required with three years or greater of related professional experience in marketing, communications, journalism, public affairs, or a related field; for candidates demonstrating comparable professional backgrounds, will accept a relevant undergraduate degree and five years or greater of relevant experience in substitution. Please note that heightened experience requirements may be required for more highly-compensated roles.

Fundraising & Development Officials

At least 50 percent of the position's work effort must involve directly soliciting prospective donors to the University for contributions, or the position's principal duties must involve providing pan-university expertise and services directly related to fundraising and development. Such positions include annual giving, alumni giving, parent giving, corporate and foundation relations, industry relations, principal and capital giving, prospect management and analysis, prospect research and data analytics, stewardship, donor relations, gift planning, and gift services. Positions whose principal duties involve supervision of fundraising & development officers would likewise qualify for this classification. Positions that provide support to fundraising activities including special events planning/management or communications do not qualify for this classification.

Minimum Education and Experience: Minimum of a bachelor's degree required with related experience; specific minimum experience standards are at the discretion of the department head based on hiring market conditions and accepted professional standards of practice within the field. For positions with responsibility for direct solicitation of gifts and funds, a minimum of one year of professional-level, direct solicitation/fundraising experience is required. Please note that heightened experience requirements may be required for more highly-compensated roles.

University Attorneys

Functions as an institutional attorney that provides legal advice to institution officials and managers.

Minimum Education and Experience: Minimum of a JD degree required; specific minimum experience requirements are at the discretion of the Vice Chancellor and General Counsel as appropriate based on professional standards of practice in the field.

Generic SAAO Roles

Certain positions which lead or direct major campus functions are generally expected to be designated as SAAO. These generic roles are listed below; Except as noted, only one of each position may exist on a campus:

- Admissions Officer
- Controller
- Development Officer
- Director of Alumni Relations
- Director of Athletics
- Director of Auxiliary Services
- Director of Budget
- Director of Career Services
- Director of Continuing Education
- Director of Contracts and Grants
- Director of Counseling and Psych Services
- Director of Environmental Health & Safety
- Director of Financial Aid
- Director of Housing & Residence Life
- Director of Human Resources
- Director of Internal Audit
- Director of Marketing (University-wide)
- Director of Public Affairs/ Information
- Director of Sponsored Research
- Director of Student Health Services
- Director of Systems and Procedures
- Director of the Bookstore
- Director of Payroll Services
- Facilities:
 - Director of Design and Construction
 - Director for Facilities Management and Planning
 - Director of Physical Plant
- Institutional Research and Planning Officer
- IT:
 - Chief Information Technology Officer
 - Information Technology Security Officer
 - Director of Systems Operations
 - Director of Business & Technology Services
- Public Safety Officer
- Purchasing Officer
- University Compliance
- University Registrar