

PSU-AAUP CBA List of Requirements

Outline of Revisions Leading to Changes in Unit Governance Documents – 2/14/17

Key for Departmental Guidelines: **Must be added** **Must be created** **Optional**

Article Title	Article-Section	Pg.	Requirement as described in CBA/FS report	Language to add to	What should be added?	Specific Required Language
	NA	NA	Access to governance documents	Bylaws	Language specifies where governance documents are housed and how they can be accessed.	Add: “Access to Governance Documents: All governance documents for the academic unit shall be posted on the academic unit’s website.”
ORS 243.698	NA	NA	PSU is required to notice and give AAUP an opportunity to bargain about any new policy, rule, procedure or working condition that falls within the mandatory scope of bargaining (as defined by ORS 243.650 et seq). The notice should be provided to AAUP 4 months in advance so that there is time to bargain through the 90 day statutory bargaining period if AAUP submits a Demand to Bargain.	Bylaws	Language that states PSU is responsible for complying with the notice and collective bargaining requirements of ORS 243.698, and that units must notify OAA 4 months in advance of the intent to create or adopt any new policy, procedure, and/or working condition that falls within AAUP's mandatory scope of bargaining (wages, hours, and conditions of employment as per ORS 243.650 et seq.) where the CBA is silent.	Add section provided under Article 8, Section 1 below in entirety with title as noted here: "Amendments and Changes to Departmental Bylaws and Departmental Employment Conditions"
Past Practices	8.1	10	All well-established past practices concerning terms and conditions of employment are to be maintained unless modified by the consent of AAUP and OAA.		Language that states that the modification of any unit's policies or procedures that fall within AAUP's scope of bargaining require notification to and approval by OAA. Notice of the intent to modify a policy or procedure should be noticed to OAA while the rule is in the draft stage, prior to adoption by the faculty.	“Modification of policies and procedures require notification to and approval by OAA. Notice of intent to modify a policy or procedure must be provided prior to adoption. Changes to bylaws and all other governance documents do not become effective until approved by OAA.”

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Academic Freedom and Governance	12.4	13	Faculty, department chairs, and deans shall have the opportunity for effective participation in deliberations leading to recommendations for appointment, reappointment, tenure, or promotion of faculty. The University will recommend that departments review guidelines, in addition to guidelines for promotion and tenure, concerning effective participation of faculty in the hiring and promotion of faculty. Departments or units shall maintain guidelines for faculty participation in decisions concerning hiring of faculty	Bylaws and/or P&T Guidelines	Guidelines for faculty participation in decisions in the hiring and promotion of faculty.	Units to add language about composition and function of search committees, P&T committee, departmental voting processes, and eligibility to vote.
Promotion and Tenure	14.2	14	University Standards and guidelines on promotion, the award of tenure and salary increases can be altered, amended, modified, added to or subtracted from after a) consultation with the Association on criteria and b) agreement with the Association on changes in procedure. Depts. do not have the latitude to make changes to P&T procedures or adopt new P&T procedures that are not consistent with those established at the University level.	P&T Guidelines	Language that states that departmental P&T guidelines shall not deviate from University P&T guidelines, and should departmental language not be consistent with University guidelines, the University guidelines shall be controlling.	Add section in entirety: "Departmental P&T Guidelines as Interpretation of University P&T Guidelines; The department's P&T Guidelines are an interpretation of and subordinate to the University P&T Guidelines. These department P&T Guidelines are not effective unless and until approved by the Dean and OAA. Changes to the department's P&T guidelines shall not be effective unless and until approved by OAA."
Institutional Career Support/Peer Review	16.2	14	Incorporate in P&T Guidelines "Procedures for Post-Tenure Review at Portland State University"	P&T Guidelines	Procedures for Post-Tenure Review	Those units without approved PTR guidelines may refer to Article 16, Section 2 or the PTR template on the OAA website: https://www.pdx.edu/academic-affairs/promotion-and-tenure-information

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Academic Professional Faculty	17.8	19	<p>(a) All Academic Professionals shall have annual performance reviews (evaluations). The performance review year will be for the preceding 12 months. A calendar for the performance evaluation cycle shall be established and published at the same time as the promotion and tenure review cycle (distributed Sept. 2016). Academic Professionals on one-year appointments shall be reviewed annually.</p> <p>(b) Each division, school, or college is required, with the participation of the appropriate academic professional employees, to establish specific written job-relevant criteria supporting the achievement of program, division, school or college, and university goals as well as professional growth of individuals. Such evaluation methods and criteria should be clear and unambiguous, but also flexible; so that, when an Academic Professional's assignment is in multiple areas such as teaching, research, administration, and service, the evaluation will address all appropriate areas.</p> <p>(d) Performance evaluations shall document in writing consideration of: Job performance relative to established criteria during the evaluation period; Professional development and future expectations.</p> <p>The Provost, or other relevant vice president, vice provost, or dean of each division, school, or college is responsible for an annual evaluation of all Academic</p>	P&T Guidelines or Bylaws	Evaluation guidelines consistent with University guidelines. *see HR website for evaluating APs: https://www.pdx.edu/hr/evaluating-employees	<p>Add section in entirety:</p> <p>"Annual Performance Reviews for Academic Professionals. In accordance with the AAUP CBA:</p> <ol style="list-style-type: none"> 1. All academic professionals will be reviewed annually for the preceding twelve (12) months based on an evaluation cycle to be established and announced at the same time as the P&T cycle. 2. The Department Chair shall seek input from the academic professional to establish specific job relevant criteria upon which the annual review for the next review period will be based either at the time of the annual evaluation for the previous year, or at the beginning of the next review period.
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			<p>Professionals employed within his/her unit. The evaluation shall be conducted according to the guidelines established by the University. The guidelines shall be available on the Office of Human Resources website. The University will seek input from Academic Professionals and the Association if substantial changes are contemplated.</p>			
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Academic Professional Faculty	17.9(c)	20	<p>For full-time overtime-exempt Academic Professionals, the workload is expected to be approximately 2080 hours per year. Overtime-exempt Academic Professionals have no expectation of receiving additional salary for hours that exceed this number. The Association and the University acknowledge that the amount of work may cycle with time of year, specific assignments, and/or other situational demands. In the event that an overtime-exempt Academic Professional's workload is unusually high for some period of time, it is often appropriate to provide additional flexibility in order to balance out the Academic Professional's work commitment. In such cases, the Academic Professional must work in cooperation with the relevant supervisor to determine when and how such adjustments will be made. (For example, an employee's schedule in subsequent weeks could be adjusted; or, if the workload increases cyclically, there could be a subsequent decrease in work schedule.) This is not intended as an hour-for-hour adjustment, but rather as a mechanism to provide flexibility in an overtime-exempt Academic Professional's work schedule in keeping with work-life balance ideals. It is not necessary for exempt employees to maintain complex records of hours worked.</p>	Bylaws	Language that recognizes Academic Professional workload will flex around a 40 hour work week.	<p>Add section in entirety:</p> <p>"Academic Professional Workload and Worklife Balance Academic professionals that are overtime-exempt are expected to work approximately 2080 hours (which is approximately 40 hours per week) per year. Overtime exempt academic professionals have no expectation of receiving additional salary for hours that exceed this number. The amount of work may cycle with time of year, specific assignments, and/or other situational demands. In the event an overtime-exempt academic professional's workload is unusually high for some period of time the academic professional will be provided sufficient flexibility in order to balance out the academic professional's work commitment. The Department Chair and academic professional shall work together to determine when and how such adjustments will be made. This is not intended as an hour-for-hour adjustment, but rather as a mechanism to provide flexibility in an overtime-exempt Academic Professional's work schedule in keeping with work-life balance ideals. It is not necessary for exempt employees to maintain complex records of hours worked."</p>
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Non-Tenure Track Instructional and Research Faculty	18.6	26	<p>(a) The Faculty Senate is responsible for the development of guidelines governing the evaluation of non-tenure track faculty, including evaluations that occur prior to, at the time of, and following continuous appointment. Each Department/Academic Unit shall establish and maintain guidelines for review of non-tenure track instructional bargaining unit members that are consistent with guidelines developed by the Faculty Senate. Nothing in this provision affects or alters the Association’s ability to file a grievance, as provided in Article 28 that alleges a violation of such guidelines.</p>	P&T Guidelines	<p>Instructional Faculty:</p> <ul style="list-style-type: none"> • Guidelines for the evaluation of NTT instructional faculty prior to, at the time of, and following continuous appointment. Should include both the process (who is responsible, timeline, etc.) and the criteria used. • Language on remediation plans for faculty with unsatisfactory evaluation. • Guidelines for annual reviews and "milestone" review of non-tenure track instructional faculty consistent with faculty senate guidelines. <p>*see Article 18, Section 6 (b). *see Faculty Senate report.</p> <ul style="list-style-type: none"> • New hire letters may be added to appendix. <p>Research faculty:</p> <ul style="list-style-type: none"> • Departments/units with research faculty should establish and maintain guidelines for review of NTT research faculty consistent with University guidelines. 	<p>Template will be provided once revisions to NTT Instructional Faculty Guidelines are approved by Faculty Senate.</p>
Developmental Review of Non-Tenure Track Instructional Faculty	LOA #5	73	<ul style="list-style-type: none"> • Developmental reviews will follow clear guidelines developed by departments in accordance with University Promotion and Tenure Guidelines. • Review for continuous appointment will be implemented consistently and follow clear guidelines developed by departments in accordance with university Promotion and Tenure Guidelines. 	P&T Guidelines	See above.	<p>Those units that employ research faculty must include guidelines for their review.</p> <p>See above.</p>

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Professional Development and Support	19.3	28	(d) A member may utilize funds in an IPDA for activities that support the job-related professional development of the member. The use of IPDA funds is subject to the pre-approval of the member’s supervisor and to all applicable University policies and procedures regarding the appropriate use and documentation of University expenditures. Examples of such use could include, but are not limited to, travel for the presentation of scholarly work, conference fees and travel, professional organization fees, professional licensure or certification requirements, acquisition of specialized equipment (such as laboratory or art supplies), tuition and/or fees, subscriptions and books, submission fees, and relevant training and continuing education opportunities.	Bylaws	<ul style="list-style-type: none"> • Procedures for review and additional examples, specific to unit, of appropriate utilization of IPDA funds (optional). • Language to clarify that if appointment is ending, employee can no longer access IPDA funds. 	<p>Add language in entirety: "Individual Professional Development Accounts (IPDA): 1. Faculty members and academic professionals may utilize funds in their IPDA for activities that support the job-related professional development of the member. The use of IPDA funds is subject to the pre-approval of the department chair and to all applicable University policies and procedures regarding the appropriate use and documentation of University expenditures. Examples of such use from the CBA include, but are not limited to, travel for the presentation of scholarly work, conference fees and travel, professional organization fees, professional licensure or certification requirements, acquisition of specialized equipment (such as laboratory or art supplies), tuition and/or fees, subscriptions and books, submission fees, and relevant training and continuing education opportunities</p> <p>(depts. may add other appropriate examples)</p> <p>2. Full-time faculty members on sabbatical shall have their IPDA accounts funded at 1.0 FTE.</p>
PSU and AAUP Standing Committee on Work/Life Balance	LOA #4	72	The Association and the University shall establish a standing committee to continue policy and practice development that will provide support and career options for employees who balance family and career.	Bylaws	Statement about a supportive department culture (optional). *see attachment on work/life balance statements: https://drive.google.com/file/d/0ByMEZreovtf5THQxNVRydUN3Wm8/view	To be developed by department.

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Emeritus Ranks for Non-Tenure Track Faculty	LOA #6 Faculty Senate Report May 22, 2016	74 92	Eligibility of NTT faculty for emeritus rank. From Faculty Senate Report May 22, 2016: 3. The University should ensure that units within the University have approved guidelines in place regarding consideration for promotion to emeritus status. This should include: (1) criteria for assessing outstanding performance and (2) identification of unit decision making bodies for emeritus rank consideration, and (3) other appropriate process elements for a fair and consistent review process.	P&T Guidelines	<ul style="list-style-type: none"> • Criteria for assessing outstanding performance for TTF and NTTF. • Identification of unit decision making bodies for emeritus rank consideration • Process and procedures for the development and evaluation of emeritus requests. 	To be developed by department.
Salary and Retirement (sabbatical)	30.8	51	<p>Effective September 16, 2017, 9-month academic-ranked faculty members on approved sabbatical leave will be paid as follows while on leave: a. For a one-term sabbatical: 85% of base salary; b. For a two-term sabbatical: 80% of base salary; and c. For a three-term (one academic year) sabbatical: 75% of base salary.</p> <p>Effective July 1, 2017, 12-month academic-ranked faculty members on approved sabbatical leave will be paid as follows while on leave: a. For a four-month sabbatical: 85% of base salary; b. For an eight-month sabbatical: 80% of base salary; and c. For a twelve-month sabbatical: 75% of base salary.</p>	Bylaws	No additional language is required.	May refer to CBA Article 30, Section 8, pg. 51

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Salary and Retirement	30.5	49	4. Summer Session Minimum Salary Rates. Nine-month faculty employed to teach during Summer Term will be paid for Summer Term teaching at a per-credit-hour rate that is no less than 2.5% of the member's base nine-month salary rate.	Bylaws	No additional language is required. May reference article.	May refer to CBA Article 30, Section 5, pg. 49
Insurance	31.2	2	(b) Bargaining unit members may enroll in the Sick Leave Bank at such times as employees are generally permitted to make or change employee benefit selections, including at the beginning of employment, during the annual open enrollment period, or due to a qualifying life event. New bargaining unit members will be provided information regarding the Sick Leave Bank at the time that they are PSU & AAUP Agreement, 2015-19 page 53 provided other information regarding employee benefits. Bargaining unit members may also enroll in the Sick Leave Bank at any time that there is a call for donations as provided in paragraph 3(g) below. (c) Upon enrolling in the Sick Leave Bank, a bargaining unit member irrevocably pledges three hours of the member's accrued sick leave for contribution to the Sick Leave Bank, regardless of the member's FTE.	Bylaws	No additional language is required. May reference article.	May refer to CBA Article 31, Section 2, pg. 2