

1 **Memorandum of Agreement between**  
2 **Portland State University (University)**  
3 **and the Portland State University Chapter**  
4 **of the American Association of University Professors (Association)**  
5 **June 9, 2021**

7 CORRECTED (2)

8 **Subject: COVID-19 Retirement Transition Program**

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10 **Recitals:**

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12 Due to the disruptions COVID-19 has caused both on and off campus, faculty members nearing  
13 retirement may feel that now is an opportune time to begin the transition to retirement. The  
14 parties are interested in creating a retirement transition program for tenured faculty members  
15 that would afford these members greater flexibility to structure their work and their retirement  
16 transition in a way that best suits their individual needs, schedules, and course loads, as well as  
17 the individualized needs of the academic unit.



18  
19 Further, the parties acknowledge that the University is experiencing significant budget  
20 challenges because of decreases in enrollments, now exacerbated by the COVID-19 pandemic.  
21 Retirements that occur from this program may allow units to utilize the salaries of those faculty  
22 and minimize future budget reductions.

23  
24 **Agreement:**

- 25  
26 1. To participate, faculty must sign a COVID-19 Retirement Transition Agreement, which  
27 provides a transition plan through the time the faculty member retires and relinquishes  
28 tenure rights.
- 29  
30 2. To receive the benefits of the Retirement Transition Program, the member must sign the  
31 Retirement Transition Agreement no later than June 15, 2021.
- 32  
33 3. The COVID-19 Retirement Transition Agreement is designed to support the specific  
34 transitional needs and interests of the individual faculty member who has decided to  
35 separate within the designated time period of July 1, 2021 – June 30, 2022.
- 36  
37 4. Faculty members participating in this program may request to be relieved of up to 50%  
38 of their teaching assignments and service obligations in their final terms at PSU, and  
39 continue to receive their full salaries and benefits.
- 40  
41 5. The applicable chair or associate dean and the faculty member will create a written  
42 agreement specifying the nature and amount of changes to teaching and service  
43 assignments and describing how they will address any impact these changes will have  
44 on other faculty and staff. This agreement must be reviewed and approved by the Vice  
45

- 1           Provost of Academic Personnel before it is finalized to ensure equity. A copy of the
- 2           agreement will be forwarded to the Association upon execution.
- 3
- 4           6. Participating faculty are encouraged to use this time to transition research projects
- 5           and/or graduate supervision responsibilities.
- 6
- 7           7. Post-retirement provisions are not part of the COVID-19 Retirement Transition Program.
- 8           Post-retirement provisions may be discussed separately with the department chair or
- 9           dean. The participating faculty member should discuss all post-retirement options with
- 10           HR and with their ORP Retirement or PERS representative, as applicable.
- 11
- 12           8. Faculty members may seek emeritus status through University procedures:
- 13           <https://www.pdx.edu/human-resources/emeritus-emerita-information> while participating
- 14           in the Retirement Transition Program.
- 15
- 16           9. Participants will have access to their full IPDA account and distributions through the
- 17           effective date of their retirement.
- 18
- 19           10. If a faculty member is on sabbatical or has an upcoming sabbatical planned and
- 20           chooses to participate in the Program, they will be relieved of their obligation to return to
- 21           PSU after their sabbatical ends. All other duties and responsibilities under PSU's
- 22           Sabbatical Leave Policy will remain the same.
- 23
- 24           11. Those members not included in this MOU and who may be considering retirement are
- 25           encouraged to talk with their deans to discuss other options.
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- 27           12. This program will be monitored by OAA to ensure compliance. Questions about program
- 28           implementation and compliance may be brought to the OAA.
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30 This agreement shall be effective upon signature and ratification of the PSU-AAUP  
 31 membership, and shall remain in effect until June 30, 2022.

<b><u>For the University</u></b>	<b><u>For the Association</u></b>
<small>DocuSigned by:</small>  <small>B333FC565EA54C5...</small> Shelly Chabon, Vice Provost for Academic Personnel & Leadership Development	<small>DocuSigned by:</small>  <small>95A403D73648407</small> Theresa McCormick, Vice President for Collective Bargaining
June 9, 2021   7:27 PM PDT _____ Date	June 10, 2021   8:10 AM PDT _____ Date