Memorandum of Agreement between
Portland State University (University)
and the Portland State University Chapter
of the American Association of University Professors (Association)
June 9, 2021

CORRECTED (2)

Subject: COVID-19 Retirement Transition Program

Recitals:

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

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

Agreement:

1. To participate, faculty must sign a COVID-19 Retirement Transition Agreement, which provides a transition plan through the time the faculty member retires and relinquishes tenure rights.

2. To receive the benefits of the Retirement Transition Program, the member must sign the Retirement Transition Agreement no later than June 15, 2021.

3. The COVID-19 Retirement Transition Agreement is designed to support the specific transitional needs and interests of the individual faculty member who has decided to separate within the designated time period of July 1, 2021 – June 30, 2022.

4. Faculty members participating in this program may request to be relieved of up to 50% of their teaching assignments and service obligations in their final terms at PSU, and continue to receive their full salaries and benefits.

5. The applicable chair or associate dean and the faculty member will create a written agreement specifying the nature and amount of changes to teaching and service assignments and describing how they will address any impact these changes will have on other faculty and staff. This agreement must be reviewed and approved by the Vice
1. Provost of Academic Personnel before it is finalized to ensure equity. A copy of the agreement will be forwarded to the Association upon execution.

6. Participating faculty are encouraged to use this time to transition research projects and/or graduate supervision responsibilities.

7. Post-retirement provisions are not part of the COVID-19 Retirement Transition Program. Post-retirement provisions may be discussed separately with the department chair or dean. The participating faculty member should discuss all post-retirement options with HR and with their ORP Retirement or PERS representative, as applicable.

8. Faculty members may seek emeritus status through University procedures: [https://www.pdx.edu/human-resources/emeritus-emerita-information](https://www.pdx.edu/human-resources/emeritus-emerita-information) while participating in the Retirement Transition Program.

9. Participants will have access to their full IPDA account and distributions through the effective date of their retirement.

10. If a faculty member is on sabbatical or has an upcoming sabbatical planned and chooses to participate in the Program, they will be relieved of their obligation to return to PSU after their sabbatical ends. All other duties and responsibilities under PSU’s Sabbatical Leave Policy will remain the same.

11. Those members not included in this MOU and who may be considering retirement are encouraged to talk with their deans to discuss other options.

12. This program will be monitored by OAA to ensure compliance. Questions about program implementation and compliance may be brought to the OAA.

This agreement shall be effective upon signature and ratification of the PSU-AAUP membership, and shall remain in effect until June 30, 2022.

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<td>SShelly Chabon, Vice Provost for Academic Personnel &amp; Leadership Development</td>
<td>Theresa McCormick, Vice President for Collective Bargaining</td>
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