

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 **March 18, 2022**  
6

7 **Subject: Time-Period Extension for Retirement Transition Program for Tenured Faculty**  
8

9 **Recitals:**  
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11 The parties created a COVID-related retirement transition program for academic year 2021-22  
12 to permit those tenured faculty wanting to retire to ease into the process. The creation of the  
13 program was prompted by budgetary challenges faced by the University that were exacerbated  
14 by the pandemic as well by a desire to assist faculty who wanted to begin their transition to  
15 retirement.  
16

17 This original program afforded tenured faculty greater flexibility to structure their work and their  
18 retirement transition in a way that best suited their individual needs, schedules, and course  
19 loads, as well as the individualized needs of the academic unit. The retirement transition  
20 program provided for a transition of teaching and University service work during the retirement  
21 transition period; this was not a reduced FTE, but a rebalancing of work expectations during the  
22 transition period.  
23

24 Although the immediate crises of the pandemic may have abated, the Parties would like to  
25 extend this program to allow additional faculty to take advantage of the program, which will now  
26 simply be referred to as the Retirement Transition Program for Tenured Faculty (referenced  
27 below as “Retirement Transition Program” or “Program”).  
28

29 The extended Program will be implemented on the terms and conditions below which, although  
30 substantially similar to, are intended to supersede the June 9, 2021 Memorandum of Agreement  
31 regarding COVID-19 Retirement Transition Program.  
32

33 **Agreement:**  
34

- 35 1. To participate in the Program, a faculty member must sign a Retirement Transition  
36 Agreement<sup>1</sup>, which provides a one-year transition plan through the time the faculty  
37 member retires and relinquishes tenure rights.  
38
- 39 2. This extension of the [former] COVID-19 Retirement Transition Program will continue to  
40 support the specific transitional needs and interests of the individual faculty member who  
41 has decided to separate their employment with PSU and relinquish their tenure within the  
42 designated time-periods of July 1, 2022 – June 30, 2023 or July 1, 2023 – June 30, 2024.

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<sup>1</sup> Document can be found on the OAA Website

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- 3 3. To receive the benefits of this Retirement Transition Program, the faculty member must
- 4 sign the Retirement Transition Agreement no later than June 15th of the academic year
- 5 prior to retiring. Specifically:
- 6
- 7     a. Faculty retiring during academic year 2022-23 – the Retirement Transition
- 8     Agreement is due no later than June 15, 2022.
- 9     b. Faculty retiring during academic year 2023-24 – the Retirement Transition
- 10     Agreement is due no later than June 15, 2023.
- 11
- 12 4. Faculty members participating in this Program may request redistribution of up to 50% of
- 13 their teaching and service obligations in their final three terms at PSU, and continue to
- 14 receive their full salaries and benefits.
- 15
- 16 5. Redistribution of teaching and service obligations is not a reduction of FTE, but a
- 17 rebalancing of work expectations.
- 18
- 19 6. The applicable Chair (or Chair equivalent) and Dean, along with the faculty member, will
- 20 create a written Retirement Transition Agreement specifying the nature and amount of
- 21 changes to teaching and service assignments and describing how they will address any
- 22 impact these changes will have on other faculty and staff. This agreement must be
- 23 reviewed and approved by the Vice Provost of Academic Personnel before it is finalized. A
- 24 copy of the agreement will be forwarded to the Association no later than the last Friday in
- 25 June of each year of the Program.
- 26
- 27 7. Participating faculty are encouraged to use this time to transition research projects and/or
- 28 graduate supervision responsibilities.
- 29
- 30 8. Post-retirement provisions are not part of this Retirement Transition Program.
- 31
- 32 9. Post-retirement provisions may be discussed separately with the department chair or
- 33 dean. The participating faculty member should discuss all post-retirement options with HR
- 34 and with their ORP Retirement or PERS representative, as applicable.
- 35
- 36 10. Faculty members may seek emeritus status through University procedures and in
- 37 accordance with the OAA Academic Deadlines Calendar: [https://www.pdx.edu/human-](https://www.pdx.edu/human-resources/emergitus-emerita-information)
- 38 [resources/emergitus-emerita-information](https://www.pdx.edu/human-resources/emergitus-emerita-information) while participating in this Program.
- 39
- 40 11. Tenured faculty participating in this Program will have access to their full IPDA account
- 41 and distributions through the effective date of their retirement.
- 42
- 43

1 12. If a faculty member is on sabbatical during any of the years listed above in 3a or b, or has  
2 an upcoming sabbatical planned during any of the years listed above in 3a or b, and  
3 chooses to participate in this Program, they will be relieved of their obligation to return to  
4 PSU after their sabbatical ends. All other duties and responsibilities under PSU's  
5 Sabbatical Leave Policy will remain the same.  
6

7 13. This Program will be monitored by OAA to ensure compliance. Questions about Program  
8 implementation and compliance may be brought to the OAA.  
9

10 This agreement shall be effective upon signature and ratification of the PSU-AAUP  
11 membership, and shall remain in effect until June 15, 2024.  
12

<u>For the University</u>	<u>For the Association</u>
 _____ Shelly Chabon, Vice Provost for Academic Personnel & Leadership Development	 _____ David Kinsella, Vice President for Collective Bargaining
3/18/2022 _____ Date	3/18/2022 _____ Date

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