

**Memorandum of Agreement between
Portland State University (University)
and the Portland State University Chapter
of the American Association of University Professors (Association)
June 5, 2023**

Subject: Second Time-Period Extension for Retirement Transition Program for Tenured Faculty

Recitals:

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

The program was extended through June 15, 2024, with Retirement Transition Agreements due no later than June 15, 2023.

The parties agree to a second extension of the program to be implemented on the terms and conditions below which, although substantially similar to, are intended to supersede the March 18, 2022 Memorandum of Agreement: Time Period Extension for Retirement Transition Program for Tenured Faculty.

Agreement:


1. To participate in the Program, a faculty member must sign a Retirement Transition Agreement¹, which provides a one-year transition plan through the time the faculty member retires and relinquishes tenure rights.
2. This extension of the Retirement Transition Program will continue to support the specific transitional needs and interests of the individual faculty member who has decided to separate their employment with PSU and relinquish their tenure within the designated time-periods of July 1, 2024 – June 30, 2025 or July 1, 2025 – June 30, 2026.
3. To receive the benefits of this Retirement Transition Program, the faculty member must sign the Retirement Transition Agreement no later than June 15th of the academic year prior to retiring. Specifically:
 - a. Faculty retiring during academic year 2024-25 – the Retirement Transition Agreement is due no later than June 15, 2024.
 - b. Faculty retiring during academic year 2025-26 – the Retirement Transition Agreement is due no later than June 15, 2025.

¹ Document can be found on the OAA Website

4. Faculty members participating in this Program may request redistribution of up to 50% of their teaching and service obligations in their final three terms at PSU, and continue to receive their full salaries and benefits.
5. Redistribution of teaching and service obligations is not a reduction of FTE, but a rebalancing of work expectations.
6. The applicable Chair (or Chair equivalent) and Dean, along with the faculty member, will create a written Retirement Transition 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 Provost of Academic Personnel before it is finalized. A copy of the agreement will be forwarded to the Association no later than the last Friday in June of each year of the Program.
7. Participating faculty are encouraged to use this time to transition research projects and/or graduate supervision responsibilities.
8. Post-retirement provisions are not part of this Retirement Transition Program.
9. 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.
10. Faculty members may seek emeritus status through University procedures and in accordance with the OAA Academic Deadlines Calendar: <https://www.pdx.edu/human-resources/emeritus-emerita-information> while participating in this Program.
11. Tenured faculty participating in this Program will have access to their full IPDA account and distributions through the effective date of their retirement.
12. If a faculty member is on sabbatical during any of the years listed above in 3a or b, or has an upcoming sabbatical planned during any of the years listed above in 3a or b, and chooses to participate in this 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.
13. 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 15, 2026.

For the University


Shelly Chabon (Jun 5, 2023 16:51 PDT)

Shelly Chabon, Vice Provost for Academic
Personnel & Leadership Development

06/05/2023

Date

For the Association



David Kinsella, Vice President for Collective
Bargaining

06/05/2023

Date