Memorandum of Understanding (MOU)
Between University Studies (UNST or Sharing Unit)
And
School of Business Administration (Home Unit)

Reference: Shared Appointment of Tenure line faculty

I. Purpose

University Studies is Portland State University’s four-year, interdisciplinary general education program. The mission of University Studies is to facilitate the acquisition of the knowledge, abilities, and attitudes which will form a foundation for life-long learning among its students. Critical to this mission is the need to establish Shared Appointments where faculty have teaching, service and research obligations to both the Sharing and Home Academic Units.

This MOU establishes a formal collaborative endeavor between the Sharing Unit and the Home Unit. The shared appointments must: a) fulfill the missions of the collaborating department and University Studies, and b) allow the faculty involved to have the opportunity to achieve successful performance evaluations.

Intent: The Business Strategy course in the business core will be re-designed to include UNST capstone goals. School of Business will take the responsibility for offering University Studies Capstone courses for all School of Business students by redesigning the Business Strategy Capstone to meet the UNST capstone requirements. School of Business will be supported in making this change by addition of two new tenure related positions and one fixed-term position.

The faculty positions hired to support the above changes will be dedicated to improving undergraduate education by fostering faculty scholarship of discovery within a discipline. Faculty in this position will teach undergraduate students business-oriented capstone classes satisfying the capstone goals of the University Studies program.

II. Definitions

Academic Unit: an academic program, department, division, college, institute, school or center.

Home Unit: the unit most relevant to the discipline of the faculty member making the request for the shared appointment and with which the faculty member feels the closest identity.

Shared Appointment: faculty members hold shared appointments if they have appointments in two or more Portland State University units (academic or administrative).

Sharing Unit: an academic unit that has joined with a faculty member’s identified Home Unit in a collaborative manner to support a shared academic appointment.
III. Obligations and Duties of the Sharing and Home Units

This agreement is between University Studies (Sharing Unit) and School of Business Administration (Home Unit).

The shared appointments are nine month, academic year appointments.

The status of these shared appointments is annual tenure.

The rank of these shared appointments is Assistant or Associate Professor.

This faculty position is dedicated to improving undergraduate education by fostering faculty scholarship of discovery within a discipline. Faculty in this position will teach UNST capstones, in the core business curriculum. The Business Strategy course in the business core will be re-designed to include UNST capstone goals. We understand that Portland State University and the University Studies program will evolve and change over time but this expectation and related work assignment will not change; faculty in this position must teach the Business Strategy/UNST capstone courses each year. Without changing the overall commitment to Sharing Unit, the shared faculty may have the choice, at the discretion of the Home department, to teach courses other than the Business Strategy/UNST course for one year every three years. If the departmental commitment to including the UNST capstone goals in the core business curriculum is not fulfilled, the department’s next available position will revert to a central pool for reallocation by Academic Affairs to support University Studies.

In parity with department’s tenure-line faculty load, the teaching load for this position is 16 credits per year until awarded indefinite tenure, at which time the teach load increases to 20 credits per year. The actual credit hours may vary from year to year but will be adjusted to average the desired credit load on a 3 year rotation. The home department upon agreement with University Studies may fulfill the shared faculty member’s obligation to University Studies by replacing the shared faculty by a tenured or tenure-related faculty member(s) from the home department.

Typical course assignment prior to achieving tenure may look like:

<table>
<thead>
<tr>
<th>Year</th>
<th>Fall</th>
<th>Winter</th>
<th>Spring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year 1</td>
<td>No teaching</td>
<td>(6 Credit) Business Strategy/UNST capstone,</td>
<td>(6 Credit) Business Strategy/UNST capstone,</td>
</tr>
<tr>
<td>Year 2</td>
<td>(6 Credit) Business Strategy/UNST capstone,</td>
<td>(6 Credit) Business Strategy/UNST capstone,</td>
<td>(6 Credit) Business Strategy/UNST capstone,</td>
</tr>
<tr>
<td>Year 3</td>
<td>(6 Credit) Business Strategy/UNST capstone,</td>
<td>(6 Credit) Business Strategy/UNST capstone,</td>
<td>(6 Credit) Business Strategy/UNST capstone,</td>
</tr>
</tbody>
</table>

Typical course assignment after achieving tenure may look like:

<table>
<thead>
<tr>
<th>Year</th>
<th>Fall</th>
<th>Winter</th>
<th>Spring</th>
</tr>
</thead>
<tbody>
<tr>
<td>Year 1</td>
<td>(6 Credit) Business Strategy/UNST capstone,</td>
<td>(6 Credit) Business Strategy/UNST capstone,</td>
<td>(6 Credit) Business Strategy/UNST capstone,</td>
</tr>
<tr>
<td>Year 2</td>
<td>(6 Credit) Business Strategy/UNST capstone,</td>
<td>(6 Credit) Business Strategy/UNST capstone,</td>
<td>(6 Credit) Business Strategy/UNST capstone,</td>
</tr>
<tr>
<td>Year 3</td>
<td>(6 Credit) Business Strategy/UNST capstone,</td>
<td>(6 Credit) Business Strategy/UNST capstone,</td>
<td>(12 Credit) Business Strategy/UNST capstone,</td>
</tr>
</tbody>
</table>

Teaching in University Studies

University Studies welcomes faculty from a variety of backgrounds, shared faculty or faculty replacing them. New faculty will bring many different and useful perspectives on course development, teaching, and addressing the needs of students. Many of the basic responsibilities of any Portland State University faculty member remain the same in UNST. However, some
Responsibilities of faculty teaching in UNST may differ from the traditional responsibilities of university faculty. For example, when teaching within their own department, faculty can often count on students' having some sense of the basic course expectations. UNST students, on the other hand, often require a greater degree of clarity in the course expectations, the role of the course in their academic program, and the faculty's plan of evaluation.

The UNST curriculum is composed of a set of goals and a general program design approved by the Portland State University Faculty Senate. The mission of University Studies is to facilitate the acquisition of the knowledge, abilities, and attitudes which will form a foundation for life-long learning among its students. University Studies program administrators have the following expectations for faculty teaching in UNST, by way of meeting PSU's general education goals:

1. "Producing learning with every student by whatever means work best."
2. Teaching to University Studies program goals in an interdisciplinary framework.
3. Working with mentors when teaching in FRINQ and SINK.
4. Making use of inquiry-based (or project-based) teaching practices.
5. Working on faculty teams.

Service
Units should coordinate their assignment of departmental and/or program committees and other service oriented tasks to avoid undue burden on the faculty member and to avoid assigning significant service requirements that impede the faculty member's ability to meet her or his obligations to both Home Unit and Sharing Unit, especially prior to tenure. The assignment on departmental and/or program committees and service-oriented tasks, such as University-level committees should be equal to those of other tenured or tenure-track faculty in the Home Unit.

Governance
Faculty members will have voting rights equal to those normally granted to tenure-accruing faculty (of the same rank) in the Home Unit. Faculty responsibilities and privileges in governance should be equal to those of other tenured or tenure-track faculty in the Home Unit. For University committees and faculty senate, the faculty member will be represented within the college/school in which the home unit presides.

Salary Savings
If the shared faculty goes off-budget by paying a portion of his/her salary from grants or other funding sources, any salary savings will be retained by the Sharing Unit and may be used in the same way that salary savings from traditional faculty hires are used (e.g., to pay for covering courses, flexible funding for research support, etc.). If courses need to be covered, it is expected that Sharing Unit will use those savings to cover the salaries of any instructional staff or visiting faculty who teach the replacement courses, including course with the Home Unit.

Leave of Absence
When a faculty member applies for a sabbatical leave or leave without pay, the head of the Home Unit must consult with the head of the Sharing Unit to confirm that there is no disagreement about the leave. The head of the Home Unit will make use of the salary savings to fill the faculty sections with tenure-line faculty or visiting faculty with credentials equivalent to the faculty member. The arrangement will be agreed upon between the Home Unit and the Sharing Unit before the sabbatical leave is approved.

Office Space, Office Supplies and Staff Support
The appointee will maintain her/his office with the Home Unit. All instructional, teaching and secretarial support will be provided by the Home Unit. This includes a computer, telephone, photo-copying, and other instructional materials as needed.

Probationary, Tenure/Continuing Status and Promotion Review
Review of the appointee will be consistent with PSU and AAUP guidelines and will be the primary responsibility of the Home Unit. The Sharing Unit will provide input in form of on-going assessment report for Business Strategy/UNST Capstone to the appointee and/or Home Unit. The Home Unit will also have the responsibility in the management of
Personnel issues, contractual obligations with the appointee and coordination of annual performance evaluation, merit decision, tenure/continuing status and promotion in rank reviews.

**Participation in Faculty Development and Assessment Activities**
Faculty teaching Business Strategy/UNST Capstone courses will participate in University Studies mandated faculty development and assessment activities.

**F&A Return from Grants**
Allocations among units of F&A returns of grants must be negotiated for each grant on a case by case basis. In the absence of any negotiated agreement for a grant on which the faculty member serves as P.I or Co-P.I., the default allocation of F&A returns will be as follows:
- College/School of Home Unit: 50%
- Sharing Unit 50%

**Salary, Benefits, Travel, Summer Stipend and**
The salary and benefits of the Shared Appointee will be divided as follows:

- Home Unit: Responsible for 0% of the line.
- Sharing Unit: Responsible for 100% of the line

The Sharing Unit will provide the Home Unit with $20,000 per Shared faculty member, for use in recruiting, setup, and summer support at the beginning of recruitment cycle. Budget permitting, Sharing Unit may also transfer funds equal to 10% of faculty salary for summer support.

**Student Credit Hours**
The student credit hours will be assigned to the Home Unit.

**Resolving Conflicts**
The faculty member who holds a shared appointment is expected to play an active role in helping the sharing academic units effectively collaborate together. The faculty member should make the effort to become familiar with each college’s expectations and procedures. If these procedures conflict, the faculty member should speak up in a timely way. The faculty member should inform the relevant administrators of issues that arise as a result of the shared appointment.

In order to resolve personnel conflicts, it is recommended that an individual faculty member’s concerns be first expressed at the most appropriate lowest level of the Home Unit. Appropriate upper levels of administration related to the academic units should become involved only if the units’ efforts to resolve the difficulty prove to be unsatisfactory. If problems persist, the relevant upper level administrators should undertake to resolve them.

If a unit has concerns about a shared appointed faculty member’s performance or conduct, the administrator most knowledgeable about the concern should handle the difficulty. Each unit administrator has a responsibility to notify the faculty member’s Sharing Unit of the problem, and work jointly towards resolution. Assurance of the faculty member’s appropriate due processes among all involved is critical. Disciplinary action, if deemed necessary, toward the faculty in shared appointment must be recommended jointly through appropriate channels.
Notice of Appointment

This MOU must be explicitly mentioned in the Notice of Appointment. A copy of this MOU will be provided to the Shared Faculty with the Notice of Appointment. The signature of Notice of Appointment will imply Shared Faculty’s agreement with terms of this MOU.

WITNESS WHEREOF, the representatives have signed this Memorandum of Understanding on the 25th day of August, 2010.

Sukhwant Jhaj
Director, University Studies
Special Assistant to the Provost

Shawn Smallman
Vice Provost for Instruction
Dean of Undergraduate Studies

Roy Koch, Provost
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