

Memorandum of Understanding between  
Portland State University (University)  
and the Portland State University Chapter  
of the American Association of University Professors (Association)  
May 31, 2017

Subject: Re-allocation of Unspent Faculty Development Funds

*Recitals:*

Article 19 Section 4 provides for an allocation of funds for the Faculty Development Program. Each year funds previously allocated expire, many with an ending fund balance.

*Agreement:*

- I. By September 15 of each year the Office of Academic Affairs (OAA) will share with the FDC and the Association a spreadsheet of the previous year's allocation and expenditure of faculty development funds in the format provided in the University's March 30, 2017 response to the Association's February 24, 2017 Information Request.
2. At the end of each fiscal year, OAA will place in reserves a buffer (Hold-Back) of \$5,000 from funds that are released from expired projects to cover expenditures that occur in the year following the release of the funds that the faculty member's department is unable to cover.
3. All remaining funds after the Hold-Back that are unspent will be made available for re-allocation by the Faculty Development Committee (FDC).
4. The spreadsheet will include the aggregate amount of funds that are released at the end of the academic year (after carry-over approvals from OAA and/or the Faculty Development Committee (FDC)), the funds that are rolled into the FDC from unused PTR PDP plans from the previous year, the Hold-Back from that academic year, and the funds that are released from the previous academic year's Hold-Back as follows (this is an example only):

2017-18 Contractual Allocation:	\$ 675,000
2017 No Longer Allocated and Released funds:	\$ 45,000
2017 Unspent and Released Hold-Back from 2016:	\$ 3,756
2017 Unspent PTR PDP funds	\$ 7,256
2013-2017 Unspent and Released (9/15/17 only)	\$ 110,000 (see \$ below)
Total available for FDC allocation 2017-18:	\$ 841,012
2017 Hold-Back:	\$ 5,000

- S. For the communication described in 4, the communication to the FDC on or about September 15, 2017 will include the funds that have been released and unallocated since 2013 and will add those as line items, and make those funds available for 2017-18 FY

- allocation by the FDC in the communication and spreadsheet due September 15, 2017.
6. This MOU shall become an addendum to the parties' Collective Bargaining Agreement. The parties shall determine at the time of the next printing of the CBA how this MOU will be included.

<p>For the University</p> <hr/> <p><i>Shelly Chabon</i></p> <hr/> <p><b>Shelly Chabon, Vice President for Academic Personnel &amp; Leadership Development</b></p> <hr/> <p>5/1/17</p> <hr/> <p>Date</p>	<p><b>For the Association</b></p> <hr/> <p><i>Joel Padin</i></p> <hr/> <p><b>Joel Padin, President</b></p> <hr/> <p>5/1/17</p> <hr/> <p>Date</p>
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