

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 **June 9, 2021**

7 CORRECTED (2)

8 **Subject: COVID-19 Retirement Transition Program**

9
10 **Recitals:**

11
12 Due to the disruptions COVID-19 has caused both on and off campus, faculty members nearing
13 retirement may feel that now is an opportune time to begin the transition to retirement. The
14 parties are interested in creating a retirement transition program for tenured faculty members
15 that would afford these members greater flexibility to structure their work and their retirement
16 transition in a way that best suits their individual needs, schedules, and course loads, as well as
17 the individualized needs of the academic unit.

18
19 Further, the parties acknowledge that the University is experiencing significant budget
20 challenges because of decreases in enrollments, now exacerbated by the COVID-19 pandemic.
21 Retirements that occur from this program may allow units to utilize the salaries of those faculty
22 and minimize future budget reductions.

23
24 **Agreement:**

- 25
26 1. To participate, faculty must sign a COVID-19 Retirement Transition Agreement, which
27 provides a transition plan through the time the faculty member retires and relinquishes
28 tenure rights.
- 29
30 2. To receive the benefits of the Retirement Transition Program, the member must sign the
31 Retirement Transition Agreement no later than June 15, 2021.
- 32
33 3. The COVID-19 Retirement Transition Agreement is designed to support the specific
34 transitional needs and interests of the individual faculty member who has decided to
35 separate within the designated time period of July 1, 2021 – June 30, 2022.
- 36
37 4. Faculty members participating in this program may request to be relieved of up to 50%
38 of their teaching assignments and service obligations in their final terms at PSU, and
39 continue to receive their full salaries and benefits.
- 40
41 5. The applicable chair or associate dean and the faculty member will create a written
42 agreement specifying the nature and amount of changes to teaching and service
43 assignments and describing how they will address any impact these changes will have
44 on other faculty and staff. This agreement must be reviewed and approved by the Vice
45



PSU/AAUP MOA COVID Impact Retirement Transition Program
CORRECTED 2

June 9, 2021

Page 2 of 2

- 1 Provost of Academic Personnel before it is finalized to ensure equity. A copy of the
- 2 agreement will be forwarded to the Association upon execution.
- 3
- 4 6. Participating faculty are encouraged to use this time to transition research projects
- 5 and/or graduate supervision responsibilities.
- 6
- 7 7. Post-retirement provisions are not part of the COVID-19 Retirement Transition Program.
- 8 Post-retirement provisions may be discussed separately with the department chair or
- 9 dean. The participating faculty member should discuss all post-retirement options with
- 10 HR and with their ORP Retirement or PERS representative, as applicable.
- 11
- 12 8. Faculty members may seek emeritus status through University procedures:
- 13 <https://www.pdx.edu/human-resources/emeritus-emerita-information> while participating
- 14 in the Retirement Transition Program.
- 15
- 16 9. Participants will have access to their full IPDA account and distributions through the
- 17 effective date of their retirement.
- 18
- 19 10. If a faculty member is on sabbatical or has an upcoming sabbatical planned and
- 20 chooses to participate in the Program, they will be relieved of their obligation to return to
- 21 PSU after their sabbatical ends. All other duties and responsibilities under PSU's
- 22 Sabbatical Leave Policy will remain the same.
- 23
- 24 11. Those members not included in this MOU and who may be considering retirement are
- 25 encouraged to talk with their deans to discuss other options.
- 26
- 27 12. This program will be monitored by OAA to ensure compliance. Questions about program
- 28 implementation and compliance may be brought to the OAA.
- 29

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

<u>For the University</u>	<u>For the Association</u>
<p>DocuSigned by:</p>  <p>B333FC565FA54C5...</p> <p>Shelly Chabon, Vice Provost for Academic Personnel & Leadership Development</p>	<p>DocuSigned by:</p>  <p>95A403D73648407</p> <p>Theresa McCormick, Vice President for Collective Bargaining</p>
<p>June 9, 2021 7:27 PM PDT</p> <p>_____</p> <p>Date</p>	<p>June 10, 2021 8:10 AM PDT</p> <p>_____</p> <p>Date</p>

Certificate Of Completion

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Source Envelope:	
Document Pages: 3	Signatures: 2
Certificate Pages: 2	Initials: 3
AutoNav: Enabled	Envelope Originator:
Envelope Stamping: Enabled	Philip Lesch
Time Zone: (UTC-08:00) Pacific Time (US & Canada)	1825 SW BROADWAY
	Suite SMSU 232
	PORTLAND, OR 97201-3256
	phil@psuaaup.net
	IP Address: 71.193.171.72

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Status: Original	Holder: Philip Lesch	Location: DocuSign
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Signer Events

Debra Mayo-Kelley
 mayok@pdx.edu
 Security Level: Email, Account Authentication (None)

Signature



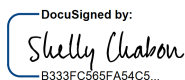
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Shelly Chabon
 chabonr@pdx.edu
 Security Level: Email, Account Authentication (None)



Signature Adoption: Pre-selected Style
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Theresa McCormick
 theresa.aaup@gmail.com
 Security Level: Email, Account Authentication (None)



Signature Adoption: Pre-selected Style
 Using IP Address: 73.11.89.251

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Agent Delivery Events	Status	Timestamp
Intermediary Delivery Events	Status	Timestamp
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Carbon Copy Events	Status	Timestamp

Carbon Copy Events	Status	Timestamp
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Notary Events	Signature	Timestamp
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