

Unit Ties

Faculty Working Together for Superior Education

Fall 2009

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A Letter from the Editor...



Susan Reese
Visiting Editor, English

Hello, Members:

I hope you enjoy this edition of our newsletter, in which you'll find thoughtful articles on negotiation, grievances, issues undertaken by Executive Council, how to become a full AAUP member, and ways to become involved in and beyond our campus, among others.

There is a lot going on right now from Furlough/Leave Days to PERS discussions and health care reform. At the top of most lists in our membership are those diminished salaries, and your AAUP Negotiating Team, Executive Council and Executive Director are all in regular dialogue about this subject, fully cognizant of President Wievel's comments at convocation wherein he clearly said that reinstatement of those monies are a top priority for him. The January election and the outcome on Ballot Measures 66 & 67 will provide a critical piece in this conversation. Please do everything you are able to do to assure passage of these measures, and stay tuned as to how you may help your AAUP help you.

It is a time of belt tightening everywhere, and to that end, our AAUP office has been examining its own budget limitations. Due to this, the Executive Council has voted to discontinue the position of Administrative Coordinator in our PSU office as a cost saving move, deciding that we can afford to staff only two positions, Executive Director and Office Assistant.

Susan Cerasin, who has worked side by side with us for 9 years, most recently in the position of Administrative Coordinator, has decided to take this opportunity to move on in her career and will no longer be in our AAUP office. This will also give her more time to spend with her adorable twin daughters. Susan has been a great friend to us, and to me personally, and I want to thank her for all she has done on our behalf during her time here. I wish her every happiness and success in her future endeavors, and know those with whom she will work are truly fortunate. Please take the opportunity to thank her and wish her well. Thank you.

Susan Reese, English Department



March With Us!

We are endorsing organization
for the Dec. 5th WTO March.

What- D5: Mobilization Against the
World Trade Organization.
When- Saturday, December 5th

12:00 Noon- Gather at Tom
McCall Waterfront Park (under the
Hawthorne Bridge)
1:00pm- March to the World
Trade Center, Federal Building
and Wells Fargo Building
2:00pm- Indoor Rally and Concert
at Portland State University.

As part of the global days of
action against the new World
Trade Organization (WTO)
Ministerial, people from across
the Northwest will be converging
in downtown Portland to speak
out against the proposed
expansion of failed "free trade"
policies and demand the
prioritization of human needs
over corporate greed.



Bargaining in Tough Financial Times: A View to the Future.

Michele Gamburd

VP for Collective Bargaining, Anthropology

Early in the morning on September 12, 2009, after 16 hours of negotiations, the PSU-AAUP collective bargaining team reached a Tentative Agreement with the University. That settlement, ratified by the bargaining unit membership on 5 October, forms the 2009-2011 Collective Bargaining Agreement.

I will not sugar coat the situation. We all take pay reductions under this agreement.

We all know the context. The university is taking a 13% cut in state appropriations, representing a \$20 million budget reduction. The Oregon University System has required PSU to set aside \$2 million in reserves in the face of reduced Federal funding when the economic stimulus package ends. In addition, in the Special Election Ballot to be cast on 26 January 2010, tax payers will be asked to vote on Measure 66 (regarding personal income tax) and Measure 67 (regarding corporate income tax). A 'YES' vote on these referenda will preserve tax increases implemented in 2009 by the legislature, thus preserving funding for K-12 and higher education, health care, and public safety. In the event that these ballot measures do not pass, further PSU budget reductions are estimated at \$2.1 million. PSU is retaining an emergency fund to cover this contingency.

This was a difficult environment in which to bargain; the financial challenges facing PSU and the Oregon University System are real. In response to these extraordinary circumstances, PSU-AAUP agreed to accept salary reductions for our bargaining unit. No member of the bargaining team found this negotiating cycle pleasant, and no member was pleased to present a settlement containing salary reductions.

If we see salary reductions as a union 'loss,' we all lose. But given the current economic context, I think we need to look more widely at what the bargaining team achieved during this contract.

In May, we presented the following bargaining priorities and principles. First, we made the choice early on, and shared it with the administration, that we wanted to keep jobs on campus and preserve PSU's human capital. That meant taking higher cuts than we would have if more people had been laid off. We have accepted cuts. But we have suffered fewer layoffs as a trade-off. Some campuses (e.g. U of O) may have lower salary reductions, but we should also look critically at their layoffs.

Second, we elected in May to shield lower-paid bargaining unit members from any cuts that might prove necessary. Although we will all see cuts in our November pay checks, these cuts will be graduated. They are also less than the cuts taken by many other state employees, and they are not retroactive.

Third, we wanted to preserve current levels of health care coverage. The bargaining team heard from many members that this was a high priority. Health care coverage will be covered through the upcoming biennium.

Fourth, we wanted to craft language so that the salary situation would "snap back" to levels in the 2007-2009 CBA. We achieved this goal; salary reductions are contained in a Letter of Agreement that expires with the end of the 2009-2011 CBA. This arrangement preserves the gains made by the collective bargaining team in 2008.

Fifth, we said that we would only accept cuts if the administration agreed to make progress on other important issues. We improved contract language about working conditions, we secured a higher percentage of multi-year contracts for fixed term faculty with seniority, we provided an opening for grant-funded research faculty to obtain longer contracts, and we crafted better language regarding intellectual property rights and made violations of these terms grievable. We also helped sustain PSU-AAUP for the long term by securing more University-paid release time for union activists. This fall, the conversation on workload continues.

As fall turns into winter, the bargaining team is preparing for a reopener on the salary issues contained in Letter of Agreement #4. We are continuing our scrutiny of the University's financial status and will be ready to restart negotiations on this vital issue in March 2010.

What we can achieve at the reopener depends on a number of factors, including the state economy, the Oregon University System's allocation of funds between campuses, and the success of faculty activists in shaping the administration's spending priorities. The students' learning conditions are faculty working conditions! Join PSU-AAUP leaders this winter and spring as we work to preserve both excellence and access on campus by making sustainable faculty compensation a top University goal.

Online Vote Survey:

Online voting was a winner, Helios less so

A surprising 86 people responded to the survey on online voting. This represents a response rate of 13.2%, which is a very large sample. Here are a few of the key findings:

- 96% trust online ballots.
- 98% were either more inclined, or indifferent to the vote being online.
- 78% believe ballot encryption is either extremely, or very important.
- 95% are in favor of PSU-AAUP using online voting in the future.
- 73% rated their online voting experience as either very good or excellent, but 21% rated their experience as fair or poor. 27% of respondents were unable to vote on the first attempt, and the most common problem appears to have been with getting the correct password input into the ballot.
- 65% are in favor of using Helios again, but 34% were not. 56% were in favor of exploring other online voting systems. Most people were indifferent to the format in comparing the Helios ballot with the Ballotbin survey.

Some of the comments we received:

"The Helios vote was complicated and on the long side, but with your clear instructions ahead of time (so I knew what was coming), it worked for me."

"I prefer the old fashioned way of voting. It takes less of my time, and seems to me to be 'appropriate technology.'"

"The Helios voting system worked just fine for me - no problems whatsoever."

"My experience with voting on line was very positive. I encountered just a couple of little problems that I worked through simply enough. I've counted ballots more than once --and this time savings for faculty/staff time was worth the small quirks to the voting system."

"I am sorry I missed the vote as I was out of the country but I like and prefer this system to the paper one."

Thank you to all who voted and participated in the survey. This is invaluable feedback, and we will craft future surveys and ballots with this input in mind.

Are you worried about losing control or ownership of your instruction when you take it online?

Michael Chamberlain

Center for Academic Excellence

Many faculty are, and for good reason. Learning Management Systems like Blackboard and Moodle make it possible for a system administrator to make an exact copy of any online course complete with content, discussion topics, assignments and quizzes with only a few key strokes. A department chair could announce that the online course development that you spent so much time on is being given to someone else to teach.

Article 20 in the new union contract, negotiated for you by PSU-AAUP, goes a long way toward protecting you from such a threat. This article, titled "Intellectual Property/ Distance Education" provides faculty with the same

protection over their online instructional materials that they have previously enjoyed over their face-to-face instruction. Specifically, the article says that that PSU and the AAUP "agree that governance and ownership do not change as a result of the medium of delivery or storage (e.g. on-line, electronic media)." This contractual protection means that the AAUP can utilize the established grievance procedure and even take court action in instances where faculty ownership over online instruction is being violated.



" I thought the Helios Online voting system was pretty neat...
I got the clear impression that the system was designed to be tamper proof, hence a reliable tool for voting. "

-online voting survey participant

PSU-AAUP Grievance Update

Dean's Checklist Summary

The Association filed a grievance in Spring 2009 regarding changes in procedure for promotion and tenure reviews. The University changed the "Dean's Checklist," which governs the materials that the departments send to their Deans, and the Deans send on to the Provost. The changes mandated that departments send all annual reviews of promotion or tenure candidates to the Dean, going back in history to the time that they joined PSU.

Until this change, inclusion of annual reviews in the tenure review packet was inconsistent: some departments sent every annual review in every tenure packet, while others sent none. PSU-AAUP filed a grievance on the grounds that this change in the Dean's checklist represented a change in process, and that the faculty must agree to any change in process. After the grievance was filed, the University restored the old Dean's checklist, but not before a number of candidates for tenure had been considered using the new procedure.

In seeking to settle the grievance, the motivation for the University's action emerged. In addition to seeking to make the tenure procedure consistent across the various schools and colleges, the university felt that this change would help to ensure that annual reviews were actually conducted (as is required by the P&T procedures) and that the results were recorded. The lack of written reviews had been a problem for some faculty who, after a number of positive oral annual reviews, were then shocked by an unfavorable third year review. The association felt that faculty who are just now coming up for tenure had been given reviews

by their department over the preceding five years in the expectation that these reviews would be confidential. A post-hoc mandate that the Dean and all of the representatives on the Dean's advisory committee should be able to see the records of a review that had been conducted in confidence might unfairly jeopardize a promotion.

PSU-AAUP and the University reached an agreement that the new process would apply only to new hires beginning Fall 2009, and that annual reviews of those hired prior to Fall 2009 would not automatically be included in the tenure file sent to the Dean. The caveat is, and always has been, that the Provost has a right to see any annual review, and may ask to do so at any time.

On a related note...

A tenure track faculty member, moving toward tenure review, was told by his department chair that he would be reviewed based upon the new departmental P&T guidelines. His letter of appointment, however, advised he would be reviewed by the guidelines that were in place at the time of his appointment. These new guidelines were considerably more comprehensive than the old ones; it required new external measures, and a standard of peer review publications not previously sought. The tenure track faculty member had not sought publication based upon these measures and the new standard virtually guaranteed a denial of tenure.

PSU-AAUP brought this issue to the department chair and up the supervisory chain, where the university affirmed, in writing, that the tenure track faculty member would be reviewed based upon the standards in place when he was first appointed.

Vote Yes on Tax Measures 66 and 67!



It's official: This January, there will be a special election on two ballot measures that will protect funding for critical services: schools, healthcare, and public safety.

Measures 66 and 67 will protect nearly \$1 billion in funding for our classrooms, senior care, and other critical services. But most people--including your friends and family--don't know there's an election coming up, or that they should vote YES to preserve services **and** protect middle-class taxpayers.

Vote YES on Measures 66 and 67 on January 26! Visit www.VoteYesForOregon.org, sign the Vote Yes Pledge, and let us know you support a Yes Vote this January! Get involved with the Vote Yes Campaign: Sign up online to volunteer!

Measures 66 and 67 protect funding for critical services by increasing the \$10 corporate minimum income tax (for the first time since 1931) and increasing the tax rate on household income above \$250,000. Further, 66 and 67 creates a tax break for about 280,000 people by exempting the first \$2,400 of unemployment benefits. In this time of economic crisis, it's critical that we preserve basic services (education, healthcare, and public safety) while keeping the burden off of middle-class families.

For more information, visit www.VoteYesForOregon.org. Voting YES on 66 and 67 will help keep our schools open, protect senior services, and help keep our communities safe.

What's Happening at PSU-AAUP?

Fall Membership Drive

Our fall membership drive is off and running. As of September 30 we've increased membership by just over 8%. Unit Reps, so far, have referred the lion's share of Fair Share Fee Payers, but with 3 months to go, that could easily change.

This is a critical time to build membership. The ratification is behind us, yet we hope to be able to reopen the salary side letter in March to pursue restoration. It is important for the university to see those membership applications roll in between now and March so they understand that all faculty stand together in pursuit of restitution.

Any member of the bargaining unit can participate in the Membership Drive and earn rewards. The Association will load \$10 onto a gift card to a local merchant for every new member that is recruited; the recruiter need only put his/her name on the referral line of the signed membership application. Several people already have earnings over \$100, and we are hearing of plans for departmental social funds, Christmas gift exchanges, and other shared use of the earnings.

For more information about the program, or about Fair Share Fee Payers in your school or department, please call the office. The Membership Drive continues until the end of term in December.

Contract Action Campaign

Your contract action committee is busy preparing for re-openers in March, and to decry the plight of the university as it reels from budget cuts, increased workload, and a diminished student experience from those cuts when enrollment is surging. It is clear to the team that faculty interests and student interests are married in how the classroom has been impacted this year. The teams focus is on supporting students in getting a better education at PSU, bringing to light the continued growth of administrative positions which take resources from the classroom, and as a corollary supporting the membership drive, building membership, and keeping faculty focused on what is possible at PSU, and in bargaining in April. Faculty will soon begin seeing banners and flyers on campus soon. If you are interested in participating in upcoming contract action, please contact the office.

Unit Reps and Bulletin Board Kits

Unit Rep training was held for 35 unit reps on September 22 where Executive Director Phil Lesch

discussed the broadcast fax distribution system and made the request for a PSU-AAUP bulletin board in every department.

Having dedicated space in departments for PSU-AAUP flyers is the next step in getting the word out. If your department lacks a bulletin board, or more importantly, if your department lacks a unit rep, please step up and volunteer to help out. The duties of the Unit Rep are minimal, yet their role in keeping the membership connected is critical.

We will be producing the bulletin board kits this fall, and a signup sheet for bulletin board kits was started at the Unit Rep meeting on September 22. If a unit rep from your department did not attend that meeting and you would like a bulletin board kit for your department, please contact the office.

Organizing at University of Oregon and Oregon State University

AFT and AAUP National have entered into a joint venture to organize tenured faculty at UO and OSU. AFT has established an office and brought in full time organizers whose efforts are supplemented by AAUP staff when they are available. So far they are encountering a more favorable reception at UO, and card signing is proceeding according to plan. They anticipate being ready to seek certification in Spring 2010. So far there is no projected date at OSU.

PSU-AAUP leadership are hopeful they are successful. Organized faculty on those campuses will help bring the issues of higher education in Oregon to a more prominent discussion in Salem, and perhaps together we can address the trend away from state support and money seeking priorities that detract from the core mission of all the campuses in the University system.

Dispute Resolutions

Upon contract renewal, a fixed term faculty member had his FTE cut by one half through a reduction in the number of classes they were offered to teach. To make matters worse, they were placed in the AFT bargaining unit and offered a contract at the adjunct rate, which represented a 56% cut in pay. PSU-AAUP stepped in, and in preparation for filing the contractual grievance was able to negotiate a return to full time status at the PSU-AAUP rate with no loss of pay. The issue was resolved at the informal level.

Legal Update

Hong v. Grant

Dr. Juan Hong is a full professor at the University of California-Irvine. Dr. Hong had, while participating in faculty governance, allegedly angered university administrators by opposing certain faculty hiring and promotion decisions and by his opposition to the university's use of lecturers in place of

Continued...

professors. After Dr. Hong was denied a merit salary increase, he filed suit against the university for violating his First Amendment right to free speech.

The U.S. District Court for the Central District of California rejected Dr. Hong's claim, finding in favor of the university. The judge reviewed the Supreme Court's decision in *Garcetti v. Ceballos*, 547 U.S. 410 (2006) and concluded that because Dr. Hong was purportedly acting "pursuant to his official duties," which included participation in faculty governance, he could not avail himself of First Amendment protection if his employer retaliated against him based on his expression of opposition to the university's policy. According to the court, the University of California-Irvine "'commissioned' Mr. Hong's involvement in the peer review process and his participation is therefore part of his official duties as a faculty member. The University is free to regulate statement made in the course of that process without judicial interference." In so holding, the court failed to acknowledge the fact that courts treat the speech of professors in an academic context differently than the speech of employees of public agencies in other contexts, and that the *Garcetti* decision explicitly set aside the question of academic speech.

Bullying and Abuse in the Workplace

Bullying at PSU

Members of the bargaining unit now have a mechanism to address bullying in the workplace in the newly ratified Article 24, where your negotiating team managed to make the PSU *Professional Standards of Conduct Policy* grievable. This means that bargaining unit members who experience behavior from a co-worker that violates this policy can not only process complaints with the university through the policy's complaint procedure, they can also file a contractual grievance. PSU-AAUP firmly believes that no bargaining unit member should experience any level of unprofessional conduct. Let us help you put a stop to it. If you are experiencing hostility of any kind, contact the office or a grievance committee representative.

New Discussion/Support Group

Have you or someone you know been bullied or harassed in your job at PSU? Has it affected your performance, job satisfaction, or life outside of work? Would you like to work in an environment free of hostility and intimidation?

If you answered "yes" to any of these questions, please join us to have a chance to talk about your experiences and learn what you can do, in a supportive and confidential setting. This new group, created by employees and supported by SEIU local 089 is not affiliated with PSU.

Authorities on workplace abuse define it this way: "Repeated, health-harming mistreatment that comes in the form of any one or some of the following

categories: work sabotage, verbal abuse, or conduct that is threatening, intimidating or humiliating." (Source: www.workplacebullying.org)

Meetings are held on the third Monday of each month at the Spiritual Life Center, 633 SW Montgomery, Room 001 (entrance on SW Broadway), in downtown Portland. The next meeting will be on Monday, October 19, 5:30-6:30 pm.

For more information, please contact Oregon Healthy Workplace Advocates at healthyworkplace.or@gmail.com

New Policies and Standing Rules at PSU-AAUP
To help streamline operations, the Executive Council has adopted a number of new policies and standing rules. You can read them in full detail on the website.

The new executive council standing rules are:

- Rule 1. Conflict of Interest Code
- Rule 2. Email Discussion and Voting
- Rule 3. Authority to Give Final Approval to all Agreements

The New Association Policies are:

- Policy 1: Association Release Time
- Policy 2: Hudson Notice Procedures
- Policy 3: Association Code of Conduct Policy

Columbia Investment Accounts Closed

For many months the Association struggled to gain access to the reserve accounts online, but their website continually locked us out of our accounts. In an effort to have more control of our funds, it was decided that we should close the accounts and move the funds bank into our checking account so that we could invest reserves in CDs available locally once interest rates start to creep back up.

Lobbyist Released and New Legislative Committee Empanelled

AAUP is pleased to announce the creation of a new Legislative Committee so that AAUP has a direct pipeline to the elected officials who fund Portland State University. Jeff Alworth has agreed to chair the committee, which is staffed by Michele Gamburd, Ron Narode, Phil Lesch, and Jonathan Uto. This comes after the release of Dave Barrows and Associates, the organization that PSU-AAUP has retained for some time for legislative purposes.

If you have some ideas, important contacts, or would like to help, please contact Jeff Alworth at alworth@pdx.edu or Phil Lesch at phil@psuaaup.net.



Communication Committee Created and Empanelled

Have you noticed how much attention PSU and higher education has received in the Oregonian of late? Notice how much they get wrong? Ever wonder what, exactly, their slant is on higher ed in Portland? We have too.

The first meeting of the new Communication Committee was held on October 29 with committee members Susan Reese, Robert Shunk, Randy Blazak and Phil Lesch. The committee decided:

- To concentrate on preparing for an op-ed piece to be placed in the Oregonian regarding the Yes on 66 and 67 campaigns, and the need to focus on quality in higher education. The committee will shoot for a meeting before the editorial board of the Oregonian in mid December to pave the way for our submission. The committee will prepare a Fact Sheet to be shared with the Editorial board, and that Fact Sheet will be used as a template for the Fact Sheet for the contract action, membership, and legislative committees.
- To begin responding to articles regarding PSU, higher ed, and other areas that impact our community. The committee will set up a search function to pull all articles of interest. The committee will review the articles and determine which need a response, get a response penned quickly, get it checked for accuracy and message consistency with the work of the other committees, and then get it out the door.

Making the Connection

Gary Brodowicz

Past President, School of Community Health

Many of you know that PSU-AAUP represents those PSU faculty holding fixed-term or tenure-related positions at or above 0.5 FTE (annualized). This group is referred to as "the bargaining unit" and comprises about 1200 faculty. There are many different (and sometimes overlapping) ways to describe the composition of the bargaining unit, and some of the more obvious include contract length (9-month, 12-month), contract type (fixed-term, tenure-related), responsibilities (teaching, non-teaching), and title (librarian, academic professional, teaching faculty, etc.). Another way to categorize the bargaining unit is by determining whether the individual is a full dues-paying member of the PSU-AAUP (i.e., "member") or a fair-share fee payer. The critical difference is that although both categories are represented by the collective bargaining agreement, only full dues-paying members can vote on the contract and hold elected office.

Once hired, all faculty are automatically assigned the status of "fair-share fee payer", and have fair-share dues deducted from their monthly paychecks. To become a *member*, however, requires that an application form be completed and submitted to the PSU-AAUP office. Many newly hired faculty members take this step as soon as they arrive on campus, but far too many procrastinate or simply don't know that such action is required to become a member.

The monthly paycheck deduction for a fair-share fee payer is slightly less than for a member; the difference is often minimal, since it is almost 80% of full member dues. The actual difference depends on one's salary rate. For example, depending on the number of years employed at PSU, the additional monthly dues deduction for a 9-month faculty member with an annual salary of \$50,000 would be in the range of \$4-\$9 (or a couple of cups of coffee each month) and a full member on a 9-month contract with a salary of \$100,000/year would have an additional \$9-\$18 deducted each month.

My purpose in describing the bargaining unit is related to the recent contract ratification, which included—for the first time at PSU—temporary salary reductions in the form of "leave days". There are some faculty I've spoken with who've expressed their dismay with this agreement. In a couple cases I've had to point out that while the faculty position at the negotiating table is certainly influenced by those we elect to represent us, it is also very much affected by the proportion of faculty in the bargaining unit who are full members. It shouldn't be difficult to understand that a bargaining unit with 90% full membership is stronger than one with 50% full membership. In one recent meeting with an angry faculty member, I was successful in making the argument that becoming a member of PSU-AAUP goes a long way in demonstrating the power of the faculty voice when negotiations are underway (the individual subsequently completed an application and became a full dues-paying member). In another instance the upset faculty member I spoke to could not be convinced and simply walked away grumbling about the failure of "the union". Each reacted in understandable ways; one acted in a manner that has the potential for favorably impacting future negotiations...the other simply failed to make the connection.

The American Association of University Professors (AAUP), established in 1915, is the only National Organization exclusively representing faculty of higher education. AAUP has pioneered the fight for tenure, academic freedom, and due process for all faculty.

The Portland State Chapter of the AAUP (PSU-AAUP) operates as both a professional association and as an exclusive collective bargaining agent, representing over 1,200 instructional faculty and academic professionals employed by Portland State University at .5FTE and above. We work to protect the rights of our bargaining unit through advocacy, collective bargaining, and grievance procedures. We are affiliated with the American Association of University Professors, the nation's only organization that exclusively represents higher education faculty, and are committed to protecting tenure, due process, and academic freedom for all PSU faculty.

Portland State Chapter of the
American Association of University Professors
PO Box 751
232 Smith Memorial Student Union
Portland, OR 97207

Phone: 503.725.4414

Fax: 503.725.8124

Email: aaup@psuaaup.net



Please visit us at
our website:
www.psuaaup.net



American Association of University Professors Portland State University Chapter Membership Application

Name _____

Last

First

M.I.

Campus Mail Code _____ Home Address _____

Academic Field & Rank _____

Extension _____ E-mail _____

Automatic Deduction Authorization

As provided under ORS 292.043, I authorize the monthly deduction of my dues to the American Association of University Professors, Portland State University Chapter. The amount of the deduction is based on my salary and AAUP status, and is calculated by the AAUP office and the Payroll Office. The monthly deductions will continue until I provide written notification to the Payroll Office.

Print Name _____

Signature _____

Department _____

Date _____

PSU-ID _____

Annual Dues

Normal Annual dues for PSU-AAUP members are 3/4 of one percent (.0075) of academic salary.
Active Entrant dues (must be new to the PSU-AAUP bargaining unit) are 3/8 of one percent (.00375, half of normal dues).

Send completed form via campus mail to mail code "AAUP"

PSU-AAUP Chapter Accountant's Report

AMERICAN ASSOCIATION OF UNIVERSITY PROFESSORS
PORTLAND STATE UNIVERSITY CHAPTER
STATEMENT OF FINANCIAL POSITION
DECEMBER 31, 2008

ASSETS	
CURRENT ASSETS	
Cash and Cash Equivalents	\$ 93,833
Investments	64,002
Accounts Receivable	<u>30,606</u>
TOTAL CURRENT ASSETS	188,441
FIXED ASSETS	
Furniture and equipment	11,657
Less: Accumulated depreciation	<u>(11,657)</u>
NET FIXED ASSETS	0
TOTAL ASSETS	<u>\$188,441</u>
LIABILITIES AND FUND BALANCE	
Accounts Payable	<u>\$31,093</u>
TOTAL CURRENT LIABILITIES	31,093
TOTAL LIABILITIES	31,093
FUND BALANCE	
Unrestricted net assets	<u>157,348</u>
TOTAL FUND BALANCE	<u>157,348</u>
TOTAL LIABILITIES AND FUND BALANCE	<u>\$188,441</u>

AMERICAN ASSOCIATION OF UNIVERSITY PROFESSORS
PORTLAND STATE UNIVERSITY CHAPTER
STATEMENT OF ACTIVITIES AND CHANGES IN NET ASSETS
FOR THE TWELVE MONTHS ENDED DECEMBER 31, 2008

REVENUES	
Dues	\$361,173
Dividends	<u>4,948</u>
TOTAL REVENUES	366,121
EXPENSES	
Administrative	41,587
Capital Loss	19,178
Communications	1,575
Collective bargaining	35,889
Contributions & donations	128
Dues	92,410
Grievances	29,873
Legislative	5,320
Memberships	7,128
Payroll	188,220
Solidarity	<u>1,634</u>
TOTAL EXPENSES	<u>422,882</u>
CHANGE IN NET ASSETS	(56,761)
BEGINNING NET ASSETS	<u>214,109</u>
ENDING NET ASSETS	<u>\$157,348</u>

AMERICAN ASSOCIATION OF UNIVERSITY PROFESSORS
PORTLAND STATE UNIVERSITY CHAPTER
STATEMENT OF CASH FLOW
FOR THE TWELVE MONTHS ENDED DECEMBER 31, 2008

CASH FLOW FROM OPERATING ACTIVITIES	
Excess of expenses over revenues	\$(56,761)
Adjustments to reconcile excess of revenue over expenses	
To net cash provided by operating activities:	
Increase in accounts payable	<u>5,307</u>
NET CASH PROVIDED BY OPERATING ACTIVITIES	(51,454)
CASH FLOWS FROM INVESTING ACTIVITIES	
Decrease in value of investments	19,118
Investment Dividends included in Income	(1,679)
Transfer of Cash into Investment	<u>(30,000)</u>
NET CASH PROVIDED BY INVESTING ACTIVITIES	<u>(12,561)</u>
CHANGE IN CASH AND CASH EQUIVALENT	<u>(64,015)</u>
CASH AND CASH EQUIVALENTS AT BEGINNING OF YEAR	157,848
CASH AND CASH EQUIVALENTS AT END OF YEAR	<u>\$93,833</u>

AMERICAN ASSOCIATION OF UNIVERSITY PROFESSORS
PORTLAND STATE UNIVERSITY CHAPTER
NOTES TO FINANCIAL STATEMENTS

NOTE 1 - SUMMARY OF SIGNIFICANT ACCOUNTING POLICIES

Nature of Organization

The American Association of University Professors, Portland State University Chapter, is a non-profit organization located in Portland. The purpose of the organization is to act as an advocate for the faculty at the university.

Furniture and Fixtures

For federal income tax reporting purposes, depreciation is computed using the accelerated cost recovery method. Maintenance, repairs and renewals that neither materially add to the value of the property nor appreciably prolong its life are charged to expenses as incurred. The estimated useful lives of the assets are 7 years. Asset purchases that qualify for the IRS code 179, expense deductions, are shown as an expense in the year of purchase.

Use of Estimates

The preparation of financial statements in conformity with generally accepted accounting principles requires management to make estimates and assumptions that affect certain reported amounts and disclosures. Accordingly, actual results could differ from those estimates.

NOTE 2 - LEASES

Operating Leases

The Association, as lessee, has various non-cancelable leases for certain equipment and property, all of which are classified as operating leases. Rent expense under these non-cancelable leases was \$8,640 for the year ended December 31, 2008.

The approximate remaining annual minimum lease payments under the non-cancelable operating leases existing as of December 31, 2008 are:

2009	8,640
2010	3,120
2011	3,120
2012	3,120
2013	3,120
TOTAL	<u>\$21,120</u>

NOTE 3 - EMPLOYEE RETIREMENT PLAN

The organization contributes to an SEP plan for employees. Expense for the year was \$3,266. There is no future funding obligation.

NOTE 4 - UNREALIZED GAIN RECOGNITION

This organization elects to use mark to market in recording its investments. This election causes an unrealized loss of \$19,178 and unrealized gain of \$1,679 to be included in the income statement.

SUPPLEMENTARY INFORMATION

AMERICAN ASSOCIATION OF UNIVERSITY PROFESSORS
PORTLAND STATE UNIVERSITY CHAPTER
ALLOCATION OF EXPENSES
DECEMBER 31, 2008

	Total	Chargeable %	Chargeable	Non-Chargeable
Administrative	\$41,587	100%	\$41,587	\$0
Collective Bargaining	35,889	100%	35,889	0
Communications	1,575	91%	1,433	142
Contributions	128	100%	128	0
Dues	92,410	24%	22,178	70,232
Grievances	29,873	100%	29,873	0
Legislative	5,320	0%	0	5,320
Memberships	7,128	0%	0	7,128
Payroll	188,220	98%	184,456	3,764
Solidarity	<u>1,634</u>	<u>0%</u>	<u>0</u>	<u>1,634</u>
	\$403,764	78%	\$315,544	\$88,220