

**Memorandum of Agreement between
Portland State University (University)
and the Portland State University Chapter
of the American Association of University Professors (Association)
February 23, 2026**

Subject: Retirement Transition Program (RTP) AY 2025-26 to AY 2027-2028

Recitals

The Retirement Transition Program (RTP) provides AAUP members with options for a successful and rewarding transition to retirement. The RTP supports the specific transitional needs and interests of the individual member who has decided to retire from their PSU-AAUP represented position. The RTP improves units' ability to plan for employee transitions, thereby benefiting the long-term health of the unit and the institution. The RTP extends the FTE redistribution concept of the previous Retirement Transition Program and provides for a new phased FTE reduction over three years.

Agreement

A. Eligibility

1. AAUP-represented employees not on fixed-term or probationary appointments and who are at least 55 years old on their planned retirement date, or who have at least 30 years of uninterrupted service at PSU, are eligible to participate. Faculty holding indefinite tenure and non-tenure-track faculty on continuous appointment (NTTF-I/CA) may elect Option 1 or Option 2. Academic professionals who have successfully completed their trial service period may elect only Option 2.
2. In addition, the employee must be fully vested in PERS or ORP as of their planned date of retirement.

B. General Provisions

1. To participate in the RTP, the eligible employee must sign a Retirement Transition Agreement (RTA), which documents a transition plan covering the period of retirement transition through the effective date of the employee's retirement, and includes an agreement to relinquish their position and tenure or continuous appointment, as applicable, effective on the planned retirement date. The RTA, once fully executed, is irrevocable and, further, the RTA cannot be changed except as expressly set forth below or by mutual agreement of the University and the employee, with notification to the Association.

2. Employees who plan to participate in the RTP must submit an application to their Department Chair or supervisor by the following dates:
 - a. By April 15, 2026, for retirement dates inclusive of July 1, 2026, to June 30, 2029.
 - b. By March 15, 2027, for retirement dates inclusive of July 1, 2027, to June 30, 2030.
 - c. By March 15, 2028, for retirement dates inclusive of July 1, 2028, to June 30, 2031.
 - d. As a narrow exception to the application deadlines immediately above, an application will also be considered to be timely if submitted to the Department Chair or supervisor within 10 working days of the date that any provisional plan is announced in accordance with Article 22, Section 4, if the applicant's position is in a department identified for potential reduction or elimination.
3. Eligible 9-month employees must have a retirement date of either 12/15, 3/15, or 6/15 of the year of retirement. When these retirement dates do not align with the conclusion of the academic term, the Parties agree that the employee is expected to complete all instructional activities for their last academic term as part of that term's contracted work requirements, regardless of when final exams are scheduled and grades are due.
4. To appropriately evaluate and manage workload impacts on other faculty and staff, unit curricular needs, service level viability, budgetary impacts, and alignment with University strategic goals, all applications for the RTP must be reviewed and approved by the Department Chair or supervisor, as applicable, and the Dean, with final review and approval authority by the Provost or their designee.
5. Post-retirement employment opportunities are not part of this RTP. If a retiring employee is interested in post-retirement employment, the employee should discuss options with HR and with their ORP or PERS advisor.
6. Faculty members eligible to seek emeritus status may seek that status in accordance with applicable departmental and University procedures as part of the final year of their RTP agreement following the regular promotion and tenure cycle or the November-December cycle.
7. Employees participating in the RTP will have access to their full Individual Professional Development Account (IPDA) and distributions through the effective date of their retirement. The Parties agree that for employees participating in a reduced FTE RTP option, the University's annual contributions to the employee's IPDA account will be prorated in accordance with the reduced FTE.
8. Employees participating in the RTP are no longer eligible for, or required to complete, a Post-Tenure Review (PTR) or a Post-Continuous Appointment Review (PCAR), as applicable, unless they are under review in the year of their application to participate in the RTP. An employee who receives an unsatisfactory PTR or PCAR in the year of application may, by

mutual agreement with their Department Chair, forego the creation of a Professional Development Plan or Faculty Improvement Plan, respectively, and the associated resources.

9. Employees participating in either option of the RTP continue to receive full healthcare benefits. The Parties agree that for employees participating in Option 2, each employee's salary, retirement, leaves, and other fringe benefits will accrue at a prorated amount consistent with their reduced FTE.
10. Applicants for this RTP, whether under Option 1 or Option 2, shall not be denied participation, whether at the department or Dean-level, solely on the basis that their curriculum, program, or academic unit is subject to restructuring or elimination in accordance with the CBA. The University will consider an application from an eligible employee to participate in either Option 1 or Option 2 where the employee has received a layoff notice, including the Memorandum of Agreement attached to the CBA titled "Notice Under Article 22, Retrenchment, Section 2(b)."
11. The Parties agree that neither an application to participate in the RTP, nor the existence of any approved RTP, will alter the layoff order in Article 17, Section 5(c), Article 18 Section 2(e)(4) and/or Article 22 Section 5(a) and (b). Stated otherwise, employees with approved RTPs or pending applications for an RTP, will be treated the same as other employees for purposes of layoff under the CBA. Any recall period would end with the RTA retirement date.
12. Where an employee with an approved RTA receives a layoff notice under the CBA, and the layoff would take effect before the agreed date of retirement, the Parties agree that the employee may elect to change the retirement date to the earlier layoff date.

C. Option 1: One-Year Effort Re-Distribution (1.0 FTE)

1. Tenured and NTTF-I/CA employees may have a redistribution of up to 50% of their teaching and/or service obligations in their final year of service. The redistribution requirements differ for tenured and NTTF-I/CA faculty. RTP participants remain at their current FTE (typically 1.0 FTE). The redistribution of teaching and service obligations is not a reduction in FTE or total effort but a redistribution of duties.
2. RTP participants may request redistribution of up to 50% of their teaching and service obligations in their transition period as follows:
 - a. Tenured employees: Changes in duties may include redistributing up to 50% of instructional and service expectations to other duties such as expanded service opportunities, community engagement, research (including transitioning research projects and/or graduate supervision responsibilities).

- b. NTTF-I/CA employees: Changes in duties may include redistributing up to 50% of instructional work assignments to other duties, such as expanded departmental/school/university service, community engagement, student mentoring, research (when appropriate), or other activities deemed appropriate by the Department Chair. While up to a 50% redistribution of instructional duties to other work is allowable, it may not always be feasible, given that 90% of an NTTF-I/CA's work is in teaching. The Parties agree that new duties outside of an NTTF-I/CA's regular work assignment may be assigned by the supervisor for the transition year.
3. Participants in RTP Option 1 are allowed to be on a sabbatical during the RTP transition year, provided they were eligible and were approved through the normal processes the year of application to the RTP.
- a. Faculty who take sabbatical during the entirety of the transition year are deemed to have satisfied any obligation to return after their sabbatical ends, as required by their sabbatical agreement and AAUP CBA Article 32, Section 7, Part 5, Obligation to Return Following Sabbatical.
 - b. Faculty who take a partial-year sabbatical during the transition year may, at their option, (i) return for the remaining term(s) of the transition year under the terms of subsections 1 and 2 above, or (ii) retire at the end of their sabbatical period without further service obligation, in which case they are deemed to have satisfied the post-sabbatical return requirement.

D. Option 2: Phased FTE Reduction (0.5 or 0.75 FTE)

1. AAUP members not on fixed-term or probationary appointments may reduce their FTE over a period of up to three academic years immediately preceding their retirement date. This is not a variable FTE option; the FTE reduction must be to either 0.50 FTE or 0.75 FTE. The FTE can remain the same during the transition period or lowered in the subsequent years. FTE must reflect the level of effort to perform the assigned duties.
2. For Tenured and NTTF-I/CA employees participating in Option 2:
- a. Faculty teaching loads will be reduced proportionately by the FTE reduction. Faculty may request to schedule their proportionally reduced teaching load equally over the academic year or in one or two terms, subject to the Department Chair's approval.
 - b. Other duties, such as departmental/school/university service opportunities, community engagement, student mentoring, and research (when appropriate), will be reduced proportionately by the FTE reduction equally over the academic year or in one or two terms, subject to the Department Chair's approval.

3. Participants in RTP Option 2 may not take a sabbatical during the phasing period. However, if the eligible employee took a sabbatical immediately prior to entering the RTP, the time served at the reduced FTE will satisfy any obligation to return after their sabbatical ends, as required by their sabbatical agreement and AAUP CBA Article 32, Section 7, Part 5, Obligation to Return Following Sabbatical.
4. Eligible 9-month employees are not eligible for overloads or stipends during the academic year in the phasing period. Eligible 12-month employees are not eligible for overloads or stipends.
5. An employee participating in Option 2 with a two- or three-year transition who receives a layoff notice under the CBA may elect to return to the FTE level they held immediately prior to entering Option 2 for the duration of their remaining employment at PSU under the layoff notice, or until their retirement date under the RTA, whichever comes first. To exercise this option, the employee must notify their supervisor within 10 working days of this notice, and the University shall have 15 working days to implement this change after the notice is provided. Further, the Parties acknowledge that the University may assign new duties outside of the former regular work assignment to meet the increased FTE, consistent with the position type.

E. Process for Review and Approval/Denial

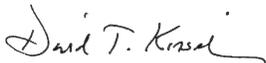
1. OAA will provide an application and general template for an RTA on the OAA website. The application is the initial document submitted by the employee to signal their intention to participate in an RTP. A completed application must be submitted by the employee to their Chair/supervisor by the due dates specified in paragraph B(2), above. If an application is approved, with or without modifications/revisions through the process described below, the result will be an RTA.
2. The University will fairly and fully consider all applications to participate in the RTP; decisions shall not be arbitrary or capricious and shall not be based on discriminatory or retaliatory reasons. However, it reserves its management right not to approve any given application, including for reasons based on the University and/or employing unit's ability to maintain its mission, to meet essential curricular needs and/or services for students, to effectively manage any workload redistribution, and to balance the requests of other employees also applying to participate in an RTP.
3. In order to provide sufficient time to evaluate each application for an RTP, discuss options, and provide an opportunity to give feedback and engage in a dialogue about the rebalanced or reduced work duties, eligible employees are encouraged to tell their Department Chair or supervisors about their interest in the RTP at least one (1) month prior to their anticipated application. The Parties acknowledge that expressing interest in an RTP does not constitute a commitment by the employee to participate in the RTP, nor should any part of any preliminary discussion be construed as approval by the Department Chair or supervisor.

4. The chair/supervisor shall review the employee's application to the RTP and forward a recommendation to the Dean within 10 working days of receipt. The employee shall agree to meet to discuss the application, if requested. The chair/supervisor and the faculty member may discuss the proposed length of the transition (Option 2), particularly as it relates to the unit's needs. The employee may elect to revise the application based on the meeting. Once the application is finalized by the employee, the chair/supervisor's recommendation shall be based on the unit's ability to maintain its mission, meet essential curricular needs or services, and effectively manage any workload redistribution. The chair/supervisor shall describe how the unit will address curricular and other needs, either through part-time employees, by reassigning duties within the unit, or by not offering some courses or services. This recommendation can be submitted by email.
5. The Dean shall review the application, consulting with the chair/supervisor and other relevant administrators. In making a decision, the Dean may consider, among other factors, the information considered by the chair/supervisor, the number of RTP applications, the budgetary implications of the proposed RTP(s), and alignment with the unit's strategic goals and staffing needs.
6. If the Dean approves, the chair/supervisor and the employee will work together to finalize a draft Retirement Transition Agreement to document either the redistribution of work or the work assignments within the reduced FTE. The Dean and/or chair/supervisor may consult with OAA on any questions. The agreement shall specify the changes to duties in each year prior to retirement.
7. If the Dean does not approve an application forwarded by the Chair, the Dean will provide a written explanation detailing the specific reasons for denial.
8. The RTA, which shall include clear documentation of the changed or revised work assignment, will be forwarded for review by the Dean's office to the Provost or their designee no later than April 30 of each year. The Provost may request revisions to the RTA or decide not to approve the RTA. If the Provost does not approve of an application forwarded to them by the Dean, the Provost will provide a written explanation detailing the specific reasons for the denial.
9. Upon Provost approval, the RTA will be routed by OAA for full execution of the agreement to be signed by the employee, the Department Chair, the Dean, the Provost or designee, and the Associate Vice President for Human Resources. The RTA will be uploaded to the employee's HR file. The RTA will be effective only as of the last date of signature of all such persons.
10. No later than the last Friday in June of each year of this Agreement, the University will provide the Association with a list of employees participating during the subsequent year,

indicating for each the RTP option selected, dates of the transition period, and the retirement date.

- 11. By mutual agreement between the employee and chair/supervisor and Dean, RTAs for phased FTE reduction may be modified for the second and/or third year of the transition period with notice to OAA and the Association.

This agreement shall be effective upon signature and ratification of the PSU-AAUP membership and shall remain in effect until June 15, 2028. All executed RTAs as of June 15, 2028, will survive the expiration of this agreement and the terms of those RTAs shall continue to be governed by this MOA as incorporated therein.

<p style="text-align: center;">For the University</p> <p style="text-align: center;"> <u>Chris Monsere (Feb 23, 2026 13:32:25 PST)</u></p> <p style="text-align: center;">Chris Monsere, Vice Provost for Faculty Success</p> <p style="text-align: center;"><u>02/23/2026</u></p> <p style="text-align: center;">Date</p>	<p style="text-align: center;">For the Association</p> <p style="text-align: center;"> <u>David T. Kinsella</u></p> <p style="text-align: center;">David Kinsella, Vice President for Collective Bargaining</p> <p style="text-align: center;"><u>02/23/2026</u></p> <p style="text-align: center;">Date</p>
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2.23.2026 Redistribution and phased retirement_FINAL

Final Audit Report

2026-02-23

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