

COLLECTIVE BARGAINING AGREEMENT

Between

**ASSOCIATION OF PROFESSORS,
SOUTHERN OREGON UNIVERSITY**

and

THE STATE OF OREGON

Acting by and through the

OREGON UNIVERSITY SYSTEM

on Behalf of

SOUTHERN OREGON UNIVERSITY

September 1, 1997 through August 31, 1999

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Article 1. PREAMBLE

Section A. This Agreement entered into as of May 8, 1998, and in effect for the period September 1, 1997 through August 31, 1999, is between the Association of Professors, Southern Oregon University (hereinafter called the "Association or APSOU"), as the exclusive bargaining agent for the faculty members described in Article 3 (Recognition), and the State of Oregon, acting by and through the State Board of Higher Education as defined by ORS 351.010 and ORS 351.070 on behalf of Southern Oregon University (hereinafter called the "University").

Section B. The basic functions of instruction, research, community and professional service at Southern Oregon University are performed by a community of men and women who are members of a profession dedicated to the advancement of learning, instruction, scholarship and service, and it is therefore fitting that they share in the formulation of plans and policies which affect their professional activities.

Section C. The teacher is entitled to freedom in the classroom in discussing the subject of the course, but should be careful not to introduce, repeatedly or deliberately, matter into teaching which has no relation to the subject.

Section D. Without imposing a financial burden or other obligation on the University to sponsor or publish, the teacher is entitled to full freedom of research and publication.

Section E. The university teacher is a citizen, a member of a learned profession, and a professional educator. When speaking or writing as a citizen, the member should be free from institutional censorship or discipline. In the exercise of this freedom of expression, and as a person of learning and a professional educator, the member should remember that the public will judge the profession and the institution by the member's utterances and actions. A member should at all times strive to be accurate, should exercise appropriate restraint, show respect for the opinions of others, and should make every effort to indicate that the member is not an institutional spokesperson.

NOW, THEREFORE, IT IS AGREED AS FOLLOWS:

Article 2. DEFINITIONS

Section A. As used in this Agreement and except as its context may otherwise require:

1. "OSBHE" and "Board" means the Oregon State Board of Higher Education and its agents.
2. The "Association" and "APSOU" means the Association of Professors at Southern Oregon University
3. "Member" means a public employee who is included in the bargaining unit, as defined in Article 3 (Recognition).
4. "University campus" means the campus of Southern Oregon University, located in Ashland, Oregon.

5. "SOU" or "University" means Southern Oregon University, an institution in the Oregon University System.
6. "ERB" means the Employment Relations Board of the State of Oregon.
7. "Unit" or "bargaining unit" means the employees, collectively, included in the bargaining unit as defined in Article 3 (Recognition).
8. "Department" means an academic department and the Library within Southern Oregon University of the Oregon University System.
9. "Agreement" means all of the definitions, provisions and terms agreed to by the two parties, as set forth in this contract.
10. "OUS" means Oregon University System.
11. "ASSOU" means the Associated Students, Southern Oregon University
12. "Summer Session" means the time including all academic offerings in the pre-session, the regular eight week session, and the post session.
13. "Visiting professor" means a faculty member on leave from another institution hired by the University to teach for one year or less on a nonrenewable contract.
14. "University calendar day" means a day when classes or examinations are scheduled and held in accordance with the official academic calendar of the University, excluding Saturdays and Sundays. Summer Session days will not be counted as days for those members not employed during the Summer Session.

Article 3. RECOGNITION

Section A. The Association of Professors at Southern Oregon University is recognized and shall serve as exclusive bargaining representative of all employees in the bargaining unit as hereinafter described except those who are or hereafter may be excluded in accordance with the rules of the Employment Relations Board or by agreement of both parties.

Section B. The bargaining unit shall consist of all OUS faculty whose primary teaching and/or research assignment is at Southern Oregon University, or who hold appointments with Southern Oregon University at the rank of professor, associate professor, assistant professor, or instructor, and whose employment during the nine-month academic year is at least .50 full-time equivalent (persons must be at least half-time employees) and who spend at least seventy-five percent (75%) of that employed time in university-level teaching and/or research activities including employees with the title Department Chair For the purposes of this description the activities of library personnel holding academic rank are considered to be teaching and/or research. For purposes of Summer Session faculty it shall be those faculty described above, but only those faculty who are employed to teach at least one (1) course of at least three (3) credits during the Summer Session or assume the responsibilities of chair as described in Article 8.

Section C. Exceptions. The only teaching faculty excluded are part-time faculty on contract for specific classes, visiting faculty, persons whose positions are contracted solely through the SOU Extended Campus Programs, and Nursing faculty holding appointments with the Oregon Health Sciences University Without determining whether the positions fall within the descriptions of Section B of the Article, and for the purpose of clarity, the incumbents appointed by the University to the following positions are specifically excluded from the bargaining unit:

1. President
2. Executive Dean to the President
3. Secretary to the President
4. Vice President for Academic Affairs and Provost, Associate Provost, Assistant to the Provost
5. Vice President, Dean, Associate Dean, and Assistant Dean
6. Director, Associate Director, and Assistant Director
7. Director, Business Services
8. University Physician
9. Registrar, Assistant Registrar

However, faculty holding half-time or less appointments to Director positions for the University who still teach or do research for the rest of their appointment shall remain in the bargaining unit, unless both parties mutually agree to exclude them.

Section D. Recognition. The President of the Association may obtain a current list of members in the unit from the Provost by written request. Such list will be provided within ten (10) working days of the request. The Provost will provide the Association with a current list of members during the fall term of each academic year and will notify the President of the Association in writing when an appointment will remove a person from the bargaining unit or add a person to the bargaining unit, within twenty (20) working days.

Section E. Notwithstanding the provisions of ORS 243.692, in the event a system-wide bargaining unit for faculty is determined to be appropriate by the Legislature or a court, then this Agreement shall not serve as a bar to the inclusion of bargaining unit members covered by this Agreement in such a system-wide unit. Southern Oregon University unit members shall be eligible to vote in such a system-wide representative election and, should a bargaining agent be selected, shall participate in collective bargaining on a system-wide agreement. Should no such system-wide bargaining agent be selected, the legal status of the Association and this Agreement shall not be affected. This Agreement between the University and the Association shall be superseded by a system-side agreement, should one be reached, upon the effective date of the latter

Article 4. ASSOCIATION SECURITY

Section A. Dues Deduction. As long as the current fair share agreement is in effect, members of the Association will have dues deducted from their paychecks. Such deduction will continue until the University has been notified in writing, by the Association, that the deduction is to be terminated. The University will, in the month following the deduction, pay to the Treasurer of the Association the total amount so deducted accompanied by a listing identifying the members for whom the deductions are being paid.

Section B. Fair Share. The Association is a fair share organization. Each bargaining unit member shall have deducted an amount equal to one hundred percent (100%) of the regular dues of APSOU, such an amount having been agreed upon as the reasonable cost of the Association for negotiations and contract administration on behalf of those who are not members of the Association. Such deductions shall be made in the manner described in Section A of this Article.

Rights of non-Association of employees based on religious tenets or conscience shall be protected. Such employees shall pay the fair share amount to a nonreligious charity in accordance with the applicable procedures in ORS 243.666 and faculty member shall provide the APSOU treasurer proof of the contribution that has been made to a nonreligious charity in order to stop subsequent APSOU dues deductions for that year. An election to rescind the fair share agreement may be held which follows the guidelines of OAR 115-30-000.

Section C. Reduction of Duties. Up to six (6) members of the Association negotiating team shall be released from all assignments other than the teaching of the regular instructional load, advising students, and keeping required office hours one (1) month prior to negotiations and during the period of active contract negotiations. The chief negotiator will be released from teaching duties from two courses for one term at APSOU selection of time.

Section D. Association Communications and Use of Facilities.

1. The University will designate bulletin board space for use of the Association in each of the major academic buildings on the SOU campus for use by the Association in communicating with employees in the unit.
2. The Association shall be allowed the use of the facilities of the University for meetings, through standard scheduling procedures when such facilities are available and the meetings would not conflict with the business of the University
3. The Association shall have reasonable access to existing University telephone service, its intra campus mail distributing facilities to the extent permitted by the U.S. Postal Service, its duplicating, copying, computing and word processing facilities, as well as media equipment. The Association shall reimburse the University for its use of supplies, services, photocopying, postage, long distance telephone charges, computing and network services at rates customarily charged by the University to its affiliated organizations.
4. The University will make available to the Association an office in a convenient location, furnished and serviced commensurate with those of faculty generally. The Association will reimburse the University for its utilities and janitorial costs at the standard rate as calculated annually

Section E. Non-Jeopardy The University and the Association recognize the right of each member of the bargaining unit to join or refrain from joining the Association, and neither the University nor the Association will discriminate against any employee because of membership or nonmembership in the Association.

Article 5. MANAGEMENT RIGHTS

Except as abridged by this Agreement, the University retains and reserves to itself all rights, powers, duties, authority, and responsibilities conferred on and vested in it by the laws of the State of Oregon and the Administrative Rules of the Oregon State Board of Higher Education.

Without limiting the generality of the foregoing, as used herein the rights of management include but are not limited to the right to: administer the University; in consultation with the departments, schedule class hours and establish or modify class schedules; institute procedural changes which are not inconsistent with this Agreement; direct the faculty and staff, including the right to hire, promote, demote, transfer, suspend, discipline or discharge any employee; and determine the physical location of departments, schools, and activities.

Other rights include but are not limited to the right to determine financial policy, including accounting procedures and reports; determine the administrative organization of the University including determining the necessary number of administrative and supervisory personnel and prescribing their duties and responsibilities, determine the size and characteristics of the faculty; determine the allocation and assignment of work to faculty members, including off-campus assignments which are not inconsistent with this Agreement; determine the control and use of University buildings, property, materials, and equipment; and determine health, safety, and property protective measures and procedures.

Additional examples of management rights include but are not limited to the right to obtain detailed supporting documentation from those making recommendations to Directors, Deans, Vice Presidents, and the President for appointments, promotions, and awards of indefinite tenure; in consultation with the faculty, develop and implement a system of faculty evaluations including specific provisions for student participation; determine degree programs, course offerings, and degree requirements, and determine ancillary services to be rendered by the University

Article 6. FACULTY GOVERNANCE

It is agreed that the Faculty Constitution and Bylaws of the Southern Oregon University faculty shall remain in existence for the duration of this Agreement. Proposed changes in the Faculty Constitution and Bylaws shall continue to be subject to the approval or veto of the University President and shall not be subject to further negotiations. Moreover, any alleged misapplication or misinterpretation of the Constitution or its Bylaws or of this Article shall not be made subject to the grievance and arbitration provision as contained in Article 17 (Grievance Procedure and Arbitration) of this Agreement.

Article 7. STRIKES

The Association, on behalf of its officers, agents, affiliates, and members agrees not to engage in a strike, slowdown, walkout, refusal to report to work, mass absenteeism, or other interruptions of work or picketing during the term of this Agreement or during negotiations for a successor Agreement. The University for its part agrees not to lock out members of the unit during the term of this Agreement or during negotiations for a successor Agreement.

Article 8. DEPARTMENTAL CHAIRPERSONS: DUTIES

Section A. The duties of the departmental chairperson are generally limited to coordination and implementation of departmental decisions, and responding to administrative direction. Such duties include but are not limited to:

- 1 Initiating or responding to requests for department recommendations to School Deans (or other administrative officers designated by the President) on such matters as salary adjustments, appointments of new faculty, promotion, tenure, terminations, budget requirements, course scheduling, teaching assignments, etc.
2. Acting as liaison between the department and administrative officers on curricular and other academic matters.
- 3 Generally acting as coordinator and communicator of departmental activities.

The University recognizes that the duties specified above entail significant time commitments. The amount of time does increase with the size of the department. Therefore, Department Chairs in departments with greater than 10 or above FTE will be given the option for up to .50 release time per quarter. Department Chairs with less than 10 FTE will be given release time up to .33 per quarter. There may be cases in which the chair in consultation with the Dean will propose a different arrangement for release time. This must be approved by the Provost. If release time is not feasible, compensation in lieu of release time will be granted at the part-time rate and only after approval by the Dean and the Provost.

Section B. Summer Session. There are certain Department Chair duties that continue into the Summer Session. It is in the interest of the University (particularly for incoming freshmen) that advising and other typical Department Chair duties, as noted in Section A. 1, 2, and 3 above, be continued into the Summer Session. Department Chairs will be available throughout the Summer Session so they can respond to reasonable requests for information from the administration and the general public. The compensation will be paid on the same schedule as faculty teaching a three credit course for the eight week Summer Session (6% of 9 month salary). This responsibility can be transferred to one other faculty member for the summer and two to three small departments may combine for the purpose of Summer Session to provide a single Department Chair. Department Chairs who currently have 10-month contracts will negotiate with the Dean and Provost to determine the additional time needed to carry out these duties.

Article 9. PROFESSIONAL DEVELOPMENT OF FACULTY MEMBERS

The University recognizes that it shares with its faculty the responsibility for the development and improvement of faculty performance. Due to the emphasis on curricular reform in both the core curriculum and the major, the University has an interest in focusing a certain portion of faculty development activities toward pedagogy and curriculum. The University and the Association support the principle of continuing professional development of faculty and the improvement of instruction. Faculty are encouraged to use funds from Sections A, B and D of this Article. Funding requests may be first forwarded to the Department Chair, then to the Dean and finally to the Provost. A report of expenditures as provided for in this Article and all sections thereof, that details how money was distributed to individuals or academic units, shall be provided to the Association President by July 31 of each year.

Section A. Professional Development. The University will allocate \$42,000 for 1997-98 and \$42,000 for 1998-99 for the purpose of professional development. One-third of those monies will be directed toward professional development for reforming the major and potential reforms to the core curriculum. With the remaining funds, priority shall be given to proposals for course revision, improvement of teaching methodology and skills, updating faculty in their disciplinary fields, retraining faculty for new assignments, providing instructional resource materials and consultation and developing interdisciplinary courses, promoting activity by faculty in professional organizations and interdisciplinary courses separate from the core. The funds shall be distributed by the Provost upon recommendation of the Faculty Development Committee.

Section B. Travel to Professional Meetings. The University's allocation for travel support to members to professional meetings will be \$44,000 for 1997-98 and \$44,000 for 1998-99.

The allocation and management of these funds shall be in accordance with the following guidelines.

Sixty percent (60%) of the travel money shall be distributed among the departments on the basis of the ratio that members' FTE in each department bears to the total of members' FTE in the University. Funds allocated in this subsection may be used to support travel for faculty either attending or participating in a professional meeting. Allocation of funds from this subsection to individual faculty members shall be subject to departmental procedures regarding eligibility, amount, and priority.

Forty percent (40%) shall be distributed to the Deans of schools on the basis of the ratio of FTE in the school to the total FTE in the University. Deans need not distribute this money proportionately to departments within the school. Members eligible for funds from this subsection may request them in addition to or in lieu of funds provided to the departments.

Section C. Research. Faculty can consult the Faculty Constitution and Bylaws for more information on funding and release time for faculty to conduct research.

Section D. Faculty Recruitment and Retention. In order to sustain an atmosphere conducive to the recruitment of an excellent and diverse faculty, retention, and support of existing faculty, the University will provide a Faculty Enhancement Fund of \$80,650 for 1997-98 and \$80,650 for 1998-99. The Provost shall be obliged to disburse these monies strictly pursuant to the following guidelines:

1. **Faculty Travel.** The University will provide at a minimum \$20,000 for 1997-98 and \$20,000 for 1998-99 to support faculty travel. These funds shall be administered by the Provost consistent with procedures for the allocation of other monies from the Faculty Enhancement Fund.

The remaining funds shall be allocated as follows.

2. **Retention of Faculty.**

- a. At least 40% of monies available in a given year shall be spent for the purpose of retaining faculty members whose contributions are such that their loss would significantly affect the quality of the teaching, scholarly, and service mission of the University.
- b. No award to a single individual shall exceed \$4,000 in a given year.

- c. These monies may be used for such purposes as:
 - (1) Released time for teaching improvement, curriculum development, research, and other professional development activities.
 - (2) Other types of support, including travel, equipment, services and supplies, temporary clerical assistance, student assistants, etc.
- d. These funds shall not be used to effect a base salary increase.

3 **Recruitment of Faculty**

- a. The remaining monies available in a given year shall be spent for the purpose of recruiting new faculty members.
- b. No award to a single individual shall exceed \$4,000 in a given year, unless augmented from the Targeted Excellence Fund (cited below).
- c. If an addition to the advertised base salary is made at the time of appointment, it shall not exceed \$1,000.
- d. These monies may be used for such purposes as:
 - (1) Moving expenses.
 - (2) Housing subsidy (one year only).
 - (3) Search expenses - transportation, lodging, meals.
 - (4) Travel to professional meetings.
 - (5) Summer fellowships.
 - (6) Released time (one year maximum).
 - (7) Support for curriculum development, research, or other professional activity
 - (8) Support for completion of terminal degree.

These guidelines shall not prohibit the University and the Association from mutually consenting to alternative expenditures of these monies, however

- e. **Recruitment of Minority Faculty** It is in the best interest of the University to seek and hire an excellent and diverse faculty With the support of the State Board of Higher Education and OUS, the University will, when feasible, recruit and support ethnic minority faculty It may be possible to augment the support of ethnic minority tenure track positions with matching funds from OUS's Targeted Excellence program. In an effort to compete for promising candidates, the University may, in consultation with the Department Chair and Dean, offer a combination of enhancements up to \$6,000 for the first year The amounts in Section 2 above would apply after the first year

- 4. A fund of not less than \$8,000 will be established to remedy the potential salary issues arising under the Civil Rights Act of 1964. The Deans will recommend remedy to the Provost who will make the final determination. The APSOU President will be notified of any actions taken.
- 5. Monies not expended for the purposes outlined in 3.d.(2) and 3.d.(3) above shall be available for use in Sections A and B of this article at the discretion of the Provost.

Article 10. APPOINTMENTS AND EVALUATION OF FACULTY

Section A. Initial Appointments. Initial appointments to the full-time faculty at Southern Oregon University shall be by one-year, fixed-term appointments, renewable up to five (5) years beyond the first appointment. Appointments will be made upon the recommendation of the department and the school, and at the discretion of the President. This period of continuous employment on six (6) one-year, fixed-term appointments in a single department shall be regarded as a probationary period of employment. Any exception to the single department requirement shall be by agreement among the individual, department, Dean of the school, Provost, and President, and set down in writing. For the purpose of determining the probationary period or notice in Section B, paragraph 5, only contracts for full academic or fiscal years shall be counted.

Section B. Faculty on One-Year, Fixed-Term Appointments.

- 1 All faculty on one-year, fixed-term appointments shall be evaluated each year by the department chair in consultation with the Department Personnel Committee. The report of the evaluation, carrying the signature of the Department Chair and the faculty member, is to be forwarded through the Dean and the Provost to the office of the President not later than March 1 in the first year of employment and not later than January 15 in subsequent years. The report shall be accompanied by a recommendation on reappointment.
2. During the fifth year of consecutive, full-time service in a single department, a colleague evaluation shall be completed for the faculty member
- 3 During the fifth year of consecutive, full-time service in a single department, the faculty member may apply for an appointment on a three-year, extendable contract or tenure provided that a colleague evaluation has been completed by December 15. During the sixth year of consecutive, full-time service in a single department, the faculty member must be reviewed for appointment on a three-year, extendable contract or tenure. For the purposes of this Agreement, the three-year, extendable contract shall be defined as a contract which permits, following the first year of the contract term, the term of the contract to be extended an additional year if required conditions have been met, leaving the faculty member at the beginning of each year with a contract having a three-year term. The procedures for application for a three-year extendable contract or indefinite tenure shall follow the guidelines of the Faculty Constitution. A summary of procedures and a schedule of deadlines shall be published and circulated to the faculty at the beginning of the academic year. The final decision of the President shall be given to each faculty member no later than May 1 of the year in which the application is made.
4. The review precedent to initial appointment on a three-year, extendable contract will follow the procedure and criteria outlined for tenure review since such appointments will serve as an alternative to appointment on indefinite tenure. Should the faculty member be denied placement on a three-year, extendable contract or tenure during the sixth year of consecutive, full-time service in a single department, that faculty member must be placed on a one-year, terminal contract for the seventh year. In exceptional cases, after the written recommendation of the department and with the concurrence of the President and the faculty member, the faculty member may be continued on one-year, renewable contracts or on a three-year, fixed-term contract which specifies both the length and purpose of the exceptional period. In no case may the faculty member be

continued beyond ten years of consecutive, full-time service on fixed-term contracts, except as provided in "7" below. The faculty member may not be placed on a three-year, extendable contract without specific action by the administration.

5. When teaching faculty on renewable, fixed-term appointments will not be offered a new contract, notice will be given as follows.
 - a. On or before March 15 in the first two years of continuous, full-time service;
 - b. On or before December 15 in the third and fourth years of continuous, full-time service;
 - c. On or before June 15 thereafter while in continuous, full-time service, to provide twelve (12) months of notice.

6. Notwithstanding the above, athletic coaches will be hired on fixed-term appointments for one, two or three years which may be renewed indefinitely
 - a. Coaches may apply for a three-year extendable appointment or indefinite tenure within a teaching department, as any other faculty member, if:
 - (1) a need for the position in the teaching department can be projected for the foreseeable future;
 - (2) the coach meets fully the requirements for such an appointment within the discipline including possession of the appropriate terminal degree;
 - (3) the application is submitted for review at the appropriate time through the normal channels within and beyond that teaching department and received the approval of the President of the University;
 - (4) and, when an application is for indefinite tenure, a tenure position is available within that teaching department at the time of the application.
 - b. Coaches on fixed-term appointments in the first or second year of full-time continuous service will be notified three (3) months prior to the close of the current contract if the contract will not be renewed, thereafter six (6) months prior to the close of the current contract.
 - c. Faculty members hired as athletic coaches may assume full-time duties within an instructional department, thus dropping the coaching assignment, only if the faculty member holds a three-year extendable appointment or indefinite tenure within the department and only with the written approval of the President of the University who retains the right to assign loads to faculty

7. Non-renewal of fixed-term contracts is a nondisciplinary personnel action and does not require the specification of cause.

Section C. Faculty on Three-year, Extendable Contracts. A faculty member approved for appointment on a three-year, extendable contract will have the contract extended except when administrative action is taken.

1. When a colleague evaluation concludes in a finding of deficiencies which prevent meeting the minimal expectations for one in the faculty member's rank or current assignment, or

2. When it is determined that faculty member should be terminated for cause in accordance with the Oregon State Board of Higher Education Administrative Rules (580-21-320 to 580-21-385), or
3. When it is determined a faculty member should be given timely notice in accordance with Article 11 (Retrenchment), or
4. When the President, after appropriate consultation with the Provost, the school, and the department, determines that the contract should not be extended, the President shall write the faculty member concerning this decision.

When a colleague evaluation results in a finding of deficiencies (see "1" above), or when the President, after appropriate consultation and without being arbitrary or capricious, determines that the contract should not be extended (see "4" above), the faculty member will be continued for the remaining two (2) years of the contract after which the relationship between the institution and the faculty member will terminate. At any time during the terminal two-year period, the faculty member may be returned to a three-year, extendable contract by administrative review and administrative action which may be initiated should: (a) the deficiencies found in the colleague evaluation be remedied as verified through appropriate review by the cognizant personnel committees and administrators; or (b) the President, without being arbitrary or capricious, determines that a return to such contractual relationship is appropriate.

Section D. Colleague Evaluation. All faculty, including those on three-year extendable contracts and indefinite tenure, must undergo evaluations on the following schedule:

1. Each year the Department Chair will review the Faculty Professional Activity Plan and Faculty Professional Activity Reports with the faculty member (No report submitted to the permanent record.)
2. The third year after the last full colleague evaluation, the Department Chair will write a one page summary of performance based on: student evaluations, discussions with colleagues, and review of the Faculty Professional Activity Plan and Faculty Professional Activity Reports. The summary will include brief statements on teaching effectiveness, research, and service. Any identified problems will be noted and a plan of action reviewed with the faculty. The report, carrying the signature of the Department Chair and the faculty member, is to be forwarded through the School Dean to the Provost.
3. The third year after the Department Chair's evaluation, a full colleague evaluation as specified in Article 5, Section H (2) of the Faculty Constitution, will occur
4. **Faculty Professional Activity Plan and Report.** Annually, each faculty member shall prepare for review by his/her departmental colleagues a Professional Activity Plan and a Professional Activity Report that indicates anticipated or completed activities in the following areas: **teaching, course, and curriculum development, academic advising, scholarship, services to the University, service to the community**. Each faculty member shall submit his/her Professional Activity Plan to the Dean of the relevant school on an annual basis, no later than June 15. The Professional Activity Report shall be forwarded annually through the Dean of the school to the Provost no later than June 15

Section E. Transfers.

- 1 Faculty members who are currently on annual tenure or indefinite tenure appointments may apply in April, coincident with the tenure review date, for transfer to a three-year, extendable contract through the Department Personnel Committee, the Department Chair, the School Personnel Committee, the Dean of the school, the Faculty Personnel Committee, and the Provost. Final action shall be at the discretion of the President. Those on tenure track appointments may apply for transfer to three-year extendable contracts in the fifth or subsequent year of consecutive full-time service in a single department but only after having a completed colleague evaluation.
2. Faculty members who are currently on fixed-term or extendable contracts may apply for available tenure positions as follows:
 - a. In January of each year, the Provost shall determine the number of faculty in the bargaining unit tenured in each school. The percentage of faculty in the bargaining unit on indefinite tenure at the University should be maintained at the present goal of approximately sixty-seven percent (67%), provided qualified candidates are available and should not exceed seventy-five percent (75%) in any one school. Positions may be transferred to the tenure track when a need for the position within the school can be projected by the Dean of the school and the Provost for no less than six (6) additional years based upon the six-year plan for the school and when such a transfer would not result in an unacceptably high percentage of tenured faculty within the school. The Provost shall make a recommendation to the President, who shall determine and announce the number of positions within each school which are available for transfer to tenured status, if any. Under no circumstances will any tenured member be terminated for the purpose of achieving the percentages in this paragraph.
 - b. When the President declares that a tenure position is available in a school, the Provost shall review with the School Personnel Committee each of the disciplinary units and departments with the school in terms of the tenure status of the faculty and the current and projected needs for faculty as in the six-year plans for each unit. With the advice of the School Personnel Committee, the Provost shall announce the units from which applications will be accepted for transfer to tenure status. The announcement shall be made on or before March 1.

Teaching faculty members currently on fixed-term or extendable contracts and who are in the fifth or subsequent year of consecutive, full-time service in a single department and who have a completed colleague evaluation may apply in January for transfer to an available tenure position under the same procedures and criteria which pertain to regular tenure reviews. The transfer application may be (1) approved; (2) deferred for one (1) year only; (3) returned without prejudice and the member placed on a three-year extendable contract after which the member may apply for transfer to tenure in a subsequent year; or (4) rejected, in which case the faculty member shall be issued a one-year terminal contract or a terminal contract for the period remaining from the current extendable contract. Final action shall be at the discretion of the President. In exceptional cases, after the written recommendation of the department and with the concurrence of the President and the faculty member, the faculty member may be continued on one-year, renewable contracts or a three-year, fixed-term contract which specifies both the length and purpose of the exceptional period. In no case may the faculty member be continued beyond ten (10) years of consecutive, full-time service on fixed-term contracts, except as provided in Section B, 6 above.

Section F. Procedures for Determining “Less Than Fully Satisfactory Service.”

- 1 **The Colleague Evaluation Procedure.** If a colleague evaluation finds that a faculty member’s performance has been less than fully satisfactory for the current rank or position, the Department Personnel Committee will note the finding as well as the required corrective action, notifying the Department Chair and scheduling a second evaluation not later than the second year after such a finding. The Department Chair shall communicate the finding to the Provost through the Dean of the school. The Provost will review the finding with the faculty member in the presence of the Department Chair and Dean, permitting the faculty member to present any information or comment. If the Provost finds that the deficiency is serious enough to warrant sanction, he may issue a written reprimand. Should the second evaluation and its subsequent review by the Provost--in the presence of the faculty member, the Department Chair and the Dean--find that the deficiencies have been remedied and that current performance is fully satisfactory, the faculty member will return to the normal pattern of colleague evaluations, except that the Provost shall review the results of the first subsequent evaluation. Should the second evaluation and its subsequent review by the Provost--in the presence of the faculty member, the Department Chair and the Dean of the school-- find that the deficiencies have not been remedied, the Provost or a designee shall file charges with the President for cause and recommended appropriate sanctions.
- 2 **The Student Evaluation Procedure.** If more than fifty percent (50%) of the student evaluations for a faculty member throughout a given academic year rate the faculty member at less than “competent” or if the average rating in more than one-half of the sections evaluated in a given academic year is less than “competent,” the Department Chair shall schedule a colleague evaluation for the faculty member during the next academic year
- 3 No provision of this section shall limit the University in implementing other disciplinary action as authorized in the Administrative Rules of the Board of Higher Education in substitution for, or concurrently with, the action herein outlined.

Section G. Faculty Notice of Appointment. Memoranda shall accompany the faculty members’ Notice of Appointment listing the individual adjustments which result in the current contract salary amount--including the previous salary base and those adjustments granted each faculty member from among the across-the-board adjustments, the permanent merit award, the equity adjustment, the promotion adjustment. Notices of appointment for continuing faculty shall be sent to the faculty by December 1st of the year of appointment or within thirty (30) days of conclusion of collective bargaining.

Section H. Academic Freedom. All faculty shall have guaranteed the rights of academic freedom as defined in OAR 580-22-005

Article 11. RETRENCHMENT

Section A. “Departments.” In this Article "department" shall refer to an instructional area represented by a course prefix, a department, a school or an administrative unit or function, and shall be considered synonymous with "program" as used in OAR 580-21-300 through 390. For the purpose of this Article only, the subdivisions within the School of Business shall be considered "departments;" the Library shall also be considered as a "department."

Section B. Normal Ongoing Procedures. Traditionally, the University has been required to adjust staffing and budgets for departments in response to changes in allocations, enrollment, curricula, educational programs, mission, and state and federal regulations. Normally, and historically, these staffing adjustments are accomplished by attrition, reassignment of faculty members within the University and non-renewal of fixed-term appointments. The provisions of this Article do not apply to this ongoing and necessary practice, nor to the adjustments of departmental budgets for other than faculty compensation.

Section C. General Provisions.

1. The President of the University may declare a condition of financial exigency or a condition requiring reduction and/or elimination of a department or faculty positions after fulfilling the requirements of OAR 580-21-315 and this Article. The University's Extended Campus Programs and Summer Session are considered to be separate for purposes of financial exigency.
2. A condition of financial exigency may be declared if the President finds that the current or projected budget of the University has insufficient funds to do all of the following:
 - a. Maintain all essential programs and services,
 - b. Finance the full compensation of all faculty on tenure or three-year extendable contracts until the end of the period of appointment;
 - c. Finance the full compensation of all faculty on fixed-term appointments until the end of the period of appointment;
 - d. Finance the full compensation of all other employees until the end of the period of appointment and any required notice of non-renewal.
3. A condition requiring reduction, reconfiguration, and/or elimination of a department may be declared if the President finds that a failure to reduce or reallocate budgets would result in an impairment of function to include the academic programs (which shall mean a reduction and/or elimination of faculty members by other than the practices outlined in Section B above).
4. Recognizing the requirements of OAR 580-21-315 for prior consultation with the Chancellor and the Board, the parties agree that factual disputes regarding the existence of a condition of financial exigency or a condition requiring reduction and/or elimination of a department shall not be subject to the grievance or arbitration provisions of Article 17. An allegation that procedures set forth in this article were not adhered to is a proper subject for grievance.

Section D. Presidential Declaration.

1. Before declaring a condition of financial exigency or a condition requiring reduction and/or elimination of a department, the President shall announce the need for a declaration and present an analysis of the financial condition of the University to the Association and such other persons, groups, or committees as the President deems appropriate.

2. The President will set a time by which comments and recommendations will be due to the President, which time will be at least twenty (20) university calendar days following the announcement of the budget analysis unless the President states circumstances compelling an earlier time. The President or a designee will, at Association request, meet with representatives of the Association to hear and discuss the Association's comments and recommendations.
3. Having received such comments and recommendations as the Association chooses to provide within the specified time, the President may declare a state of financial exigency or a condition requiring reduction and/or elimination of a department.

Section E. Development of the University Plan of Reductions and Eliminations.

1. Following the declaration, the President will develop a provisional plan with consideration of the following:
 - a. Institutional guidelines and mission;
 - b. University admission patterns, historical, current and projected,
 - c. Department Chairs and Deans evaluation of the curriculum staffing needs for the next biennium for each school,
 - d. By school, the number of sabbaticals, retirements and other personnel requests that require consideration for staffing;
 - e. The dependence of other departments within the University on the departments within the school,
 - f. The ability of existing faculty to cover courses in other departments in the school,
 - g. The possible reconfiguration of majors or programs of study;
 - h. Balance between academic programs and other services.
2. The provisional plan will list the proposed reductions, reconfigurations, and/or eliminations by school while not identifying the precise means of implementation. The plan should recognize the centrality of the academic programs in relation to others.
3. The provisional plan will delineate time by which comments must be submitted, which time will be at least twenty (20) calendar days following the announcement of the first provisional plan, unless the President states circumstances compelling an earlier time. Opportunity will be provided for the Association and such other groups as the President may deem appropriate to comment on the first provisional plan.
4. During the same period, the President will require affected departments to recommend the specific means or alternatives by which the reductions and/or eliminations would be implemented, were the provisional plan adopted, which recommendations will be reviewed by appropriate administrative staff as designated by the President.
5. Having received such comments as may be provided by the specified time and the recommendations of the departments, the University Plan of Reductions and Eliminations will be developed. The President will announce the Plan which will include the reductions and/or eliminations within each department and the manner in which the reductions and/or eliminations will be implemented.

6. If the Plan includes the termination of faculty members, the order of termination within a department shall be as follows.
 - a. Fixed-term, non-renewable faculty without the terminal degree;
 - b. Fixed-term, non-renewable faculty with the terminal degree;
 - c. Fixed-term, renewable faculty;
 - d. Faculty on indefinite tenure.

Within these categories, termination shall be in inverse order of seniority by academic year, length of service in the department which has been identified for reduction or elimination, unless an exception to the order of seniority is necessary to ensure that the qualifications of the remaining faculty meet the continuing requirements of the department and to maintain compliance with the Affirmative Action Plan of the University. Within each category, and when the needs of the program or department can be met by two or more members whose qualifications are essentially equal, members with the fewest academic years of service shall be terminated first. The Provost will write the faculty member concerning the decision.

Section F. Termination Procedures.

1. When a faculty member has been identified for termination within the Plan, the University will take the following actions:
 - a. For faculty on fixed-term appointments, the University will provide the faculty member with notice prior to termination. three (3) months if in the first two years of continuous employment; six (6) months if in the third or fourth years of continuous employment; twelve (12) months if in the fifth or subsequent year of continuous employment.
 - b. For faculty on indefinite tenure or three-year extendable contracts, the University will provide notice twelve (12) months prior to termination, will offer employment in any vacant instructional or non-instructional position for which the faculty member is deemed fully qualified by the University, may offer assistance in seeking employment outside the University, and will offer the faculty member furlough status (see “2.a” below) for two (2) calendar years from the date of termination.
 - c. Under a declaration of financial exigency, the requirement of notice prior to termination is waived for all categories of faculty, though the University may provide such notice (up to that specified in “a” and “b” above) as is deemed possible by the President given the circumstances requiring the declaration.

2. Furlough Status.

- a. The President will offer furlough status to qualified faculty members in writing (see “1 (b)” above) in writing. "Furlough Status" shall mean that the faculty member may be re-employed within the home department without a search as provided in “2.(d)” below. Should the faculty member not accept furlough status in writing within thirty (30) days of the written offer, the University will have no further employment obligation.

- b. A faculty member on furlough will have the privileges of a faculty member on leave without pay
- c. The faculty member will be responsible for providing the Provost with a current address and telephone number throughout the period of the furlough.
- d. If a position is to be filled within the department from which the faculty member has been furloughed, and if the furloughed faculty member is deemed fully qualified by the University to fill the position, the furloughed faculty member may be offered re-employment without the conducting of a search.
- e. Should the faculty member not accept the appointment within fifteen (15) days of the date of the written offer being mailed to the current address on file with the Provost, the University will have no further employment obligation to the faculty member

Section G. The provisions of this Agreement shall not limit the manner or frequency with which the President may consult with persons or groups deemed appropriate nor the right to designate an individual to act for the President at any step in this procedure.

Article 12. SALARY AND FRINGE BENEFITS

Section A. Employees Retirement. For work performed on and after July 1, 1985, Southern Oregon University shall continue to pay on behalf of members then participating in the Public Employee Retirement System the statutorily required employee contribution (ORS 237.071), including the amount required under ORS 237.073 if the TIAA-CREF option has been elected. Such payments on behalf of members shall continue for the life of this agreement or until such earlier time as a member may cease to be a participating member of PERS.

The full amount of the members' required contributions paid by Southern Oregon University to PERS on behalf of members shall be considered as "salary" within the meaning of ORS 237.003(8) for the purpose of computing "final average salary" within the meaning of ORS 237.003(12), but shall not be considered "salary" for the purposes of determining the amount of employee contributions required to be contributed pursuant to ORS 237.071. The contributions paid by the University on behalf of members shall be credited to employee accounts pursuant to ORS 237.071(2), and ORS 237.073, if applicable, and shall be considered to be employee contributions for the purpose of ORS 237.001 to 237.320.

Section B. Individual Salary Base.

1. The salary base for determining the salary increase for faculty members currently employed shall be the faculty member's preceding contract amount.
2. If a faculty member is to receive more than one type of salary increase at the same time, including a general salary increase, a promotion, a step increase, or any other salary adjustment, each adjustment will be applied to the faculty member's salary base as defined above.

- 3 First Year Bargaining Unit Members. The salary of faculty members in their first year in the bargaining unit shall not be adjusted during the first year. If, however, such a member's salary is below the valid floor by the beginning of the second year of appointment, the salary shall be increased to the floor level at that time. The University and the Association agree that if a person on a non-renewable contract the previous year is rehired, that person shall receive a starting salary increased by the retention adjustment increase in the previous year (if any) or shall meet the appropriate floor salary, whichever is greater, and shall be treated like a first year faculty member with respect to raises. Bargaining unit members retiring the first of the year of either year of the biennium will receive the retention adjustment at the beginning of the academic year

Section C. Health and Dental Insurance.

- 1 The University will provide at least a contribution of \$423.00 per month from July 1, 1997 through December 31, 1998 for each eligible faculty member for participation in the State Employees' Benefits Board (SEBB) Flexible Benefits Program. Effective January 1, 1999, the new insurance board, Public Employees' Benefits Board (PEBB) will take over from SEBB. The University will reopen the Agreement to discuss any possible impacts on the current Flexible Benefits Program.
- 2 Faculty on leave without pay shall be allowed to continue group insurance by self-paying the premium for the time permitted by SEBB (and its successor, PEBB) rules.

Section D. Employee Assistance Program. The Employee Assistance Program provided by the University shall be continued for Association members. The University will provide a limited amount of assessment, counseling, and referral services to Association members at no cost during the period of this Contract. These services will be no less than those available in the preceding contract. The University reserves the right to re-bid these services upon termination of the present contract with Cascade Health, and/or modify services to respond better to employee needs.

Section E. Terminal Degree Salary Adjustment. A faculty member who does not have a terminal degree at the beginning of an academic year but receives a terminal degree (as defined by the Southern Oregon University Faculty Constitution and By-Laws) during the academic year from a recognized higher education institution shall receive at the beginning of the next academic year a base salary adjustment of \$2,000.

Section F. Promotion. A faculty member who receives a promotion in rank from Assistant to Associate Professor or from Associate Professor to Professor shall during the contract at the beginning of the next academic year, receive a 5% base salary adjustment or an amount necessary to bring the faculty member up to the floor salary for the new rank (see Section H), whichever is greater

Section G. Floor Salaries. In order to establish a reasonable spread of salaries between the academic ranks, the following floor salaries shall be set. The floor salary is for a nine-month salary rate and would not be adjusted by stipends.

**APSOU Salary Floors by Rank and Years in Retention
1997-99 Biennium**

YIR = Years in Rank*

Rank	Floor Effective 9-16-97	Floor Effective 2-1-98	Floor Effective 9-16-98	Floor Effective 2-1-99
Instructor	\$28,719	\$29,007	\$29,304	\$30,483
Assistant Professor				
Without Terminal Degree				
0-2 YIR	\$31,437	\$31,779	\$32,121	\$33,489
3 or more YIR	\$33,543	\$33,903	\$34,263	\$35,721
With Terminal Degree				
0-2 YIR	\$33,435	\$33,777	\$34,119	\$35,487
3 or more YIR	\$35,541	\$35,901	\$36,261	\$37,719
Associate Professor				
Without Terminal Degree				
0-2 YIR	\$35,163	\$35,910	\$37,053	\$39,402
3 or more YIR	\$37,269	\$38,061	\$39,267	\$41,751
With Terminal Degree				
0-2 YIR	\$37,161	\$37,908	\$39,051	\$41,400
3 or more YIR	\$39,267	\$40,059	\$41,265	\$43,749
Professor				
With Terminal Degree				
0-4 YIR	\$42,237	\$43,506	\$44,811	\$49,293
5-9 YIR	\$44,343	\$45,675	\$47,052	\$51,759
10 or more YIR	\$46,449	\$47,844	\$49,284	\$54,216

*YIR. Floor salaries apply to the number of completed years in rank and will be implemented at the start of the next academic contract.

Section H. Parental or Family Medical Leaves.

Under the federal Family and Medical Leave Act (FMLA) and the State of Oregon Family Leave Act (OFLA) the University will provide up to 12 weeks of unpaid job protected leave per year for the birth or adoption of a child, to care for a seriously ill family member or when employees have serious health conditions.

During the leave of absence, the faculty member may use accrued paid sick leave before taking unpaid leave. Benefits and Employee Assistance Program (EAP) shall be maintained by the University during the leave.

Upon termination of the leave, the faculty member shall be restored to the former position or an equivalent available and suitable position without loss of salary level, years in rank, retirement service credits, or any other benefit or right that had been earned at the time the leave of absence commenced, but reduced by any paid leave the faculty member used during the leave of absence.

Section I. Sabbatical Leaves. As noted in the Faculty Constitution and Bylaws, sabbatical leaves are a privilege extended by the University for the purpose of strengthening the academic programs of the University while also strengthening the professional preparation of the individual faculty member in scholarship, creative activity, and teaching. While OUS allows for either one, two, or three term sabbaticals, the University believes the longer term sabbaticals better serve institutional needs, thus, the University encourages its faculty to take longer sabbaticals whenever possible. In exceptional circumstances, the institution may extend sabbatical privileges over two academic years to accommodate special departmental needs. In such an eventuality, the faculty member will be eligible for a sabbatical seven (7) years from the initial sabbatical year. The salary rate for a sabbatical taken during two different academic years will be computed on the salary base in the first year of the sabbatical.

In the OUS Financial Rules, travel funds while on leave are limited to extraordinary circumstances. To comply with the intent of this rule, funding for travel during sabbatical must be approved when the initial application is approved. Travel not identified during that approval process will not be considered. This includes funds from the Provost's Office and funds from Article 9

Section J. Miscellaneous. No provision of this contract shall be construed to prevent differential salary improvements (equity or merit pay) nor to guarantee salary improvement to any member whose performance has been found to be less than fully satisfactory

Article 13. SUMMER SESSION

Section A. Selection and Appointments of Summer Session Faculty. Appointments to the Summer Session will be made upon the recommendation of the department and school, but all appointments are at the discretion of the President of the University. The departments will develop a staffing plan for the Summer Session which will: 1) respond to student needs, 2) satisfy any special staff needs brought about by the course offerings; and 3) give preference for faculty members in the bargaining unit employed during the academic year preceding the Summer Session, including those on leave.

However, that provision shall not prevent a department from recommending the employment of a faculty member from outside the institution. Faculty employed during the preceding academic year shall be appointed to the Summer Session on the basis of their nine-month salary at the close of the previous academic year. The University retains the right of appointment and assignment of load for faculty within the Summer Session, and no faculty member employed during the academic year is assured employment in the Summer Session.

Section B. Summer Session Schedule and Appointment. Faculty members scheduled to teach courses within the allocations will be guaranteed employment in the summer of 1998 and 1999 without regard to pre-enrollment or actual enrollment in assigned courses. Should a scheduled course not be taught, a faculty member may be reassigned to other service as arranged among the faculty member, the Department Chair (if available on campus), Dean of the school, the Director of Summer Session

and the Provost. Each faculty member contracted to teach in Summer Session will prepare a brief statement of professional activities to be undertaken during the period of appointment. This will include teaching, student advising (including regularly scheduled office hours), advising of new students at regularly scheduled sessions, and university or community service. This plan will be forwarded to the appropriate Dean of the school for approval prior to the issuance of the Summer Session notice of appointment.

Section C. Special Programs. Funding of approximately \$25,000 has been set aside to support special programs in 1998 and 1999 as defined in the Summer Session Guidelines, which programs may have an alternative salary schedule.

Section D. Summer Salary Recognizing that the so-called "incentive plan" for the development of the Summer School schedule is intended to benefit those schools that achieve a closer match between course offerings and enrollment demands, but also acknowledging that some courses required to be offered will not attract as large an enrollment as others, the following revenue distribution plan will be used. At the conclusion of each Summer Session, the Director of Extended Campus Programs shall prepare a revenue sharing allocation (if revenues are generated in excess of expenses) with a distribution by school. Net revenues in schools will be used to make up losses in other schools proportionate to the percent of overall net revenue among the schools. In the event of losses in any or all of the schools, the Director shall contribute to offsetting these losses from net income from Special Programs. After adjustments so that all schools at least break even, a total of 60% of the total revenue in each school will be returned to the bargaining unit members (to include OPE) according to the following formula. For each school which remains with a positive net revenue, that revenue will be divided by the sum of the credits taught by bargaining unit faculty outside the school plus three times the credits taught by bargaining unit faculty inside the school. The resulting quantity shall be called a "share." Faculty outside the school will receive one share per credit taught; faculty inside the school will receive three shares per credit taught. Library faculty will receive one share per credit hour of appointment to a maximum of nine credits. This process will be repeated for each school with a positive net revenue to distribute.

Article 14. TENURE RELINQUISHMENT AND EARLY RETIREMENT

Section A. Eligibility. A tenured faculty member may apply to the Vice President for Academic Affairs and Provost through the Department Chair and School Dean for relinquishment of tenure, provided that the faculty member is at least 55 years of age on the effective date of the relinquishment of tenure.

Section B. Approval. The University reserves the right to approve or disapprove agreements for tenure relinquishment.

Section C. Provisions.

- 1 The faculty member relinquishes all claims to tenure at a time specified within the agreement--the effective date of the agreement--which time is not more than three years prior to termination.

2. The faculty member is issued a fixed-term contract for full-time service covering the period between the relinquishment of tenure and the date of termination, which period may not exceed three years.
3. The faculty member retires at the close of the fixed-term contract.
4. The agreement may provide for part-time service by mutual agreement with the University. Any retired faculty member may be employed part-time on a term-by-term contract as herein delimited.

Section D. Definition of Appointments.

1. **Full-time Service Under an Agreement for Tenure Relinquishment.** The tenured faculty member may continue in full-time employment for not longer than three years following the effective date of the agreement.
2. **Part-time Service Under an Agreement for Tenure Relinquishment.** Following termination under tenure relinquishment, the faculty member may be employed for a maximum of 600 hours per calendar year (.33 FTE if employed only during the months of the academic year).

Section E. Salary Provisions. The salary base of the faculty member will increase six percent (6%) on the effective date of the agreement (a one-time, permanent addition to the base salary). After having entered into an agreement for tenure relinquishment and for the duration of full-time and part-time employment, the faculty member will receive across-the-board salary improvements and will have access to differential salary improvements just as all other faculty. The payment for part-time service will be based on a percentage of the faculty member's adjusted base salary, except by mutual agreement of the University and the faculty member. The adjusted base salary is the faculty member's salary at the time of retirement plus subsequent across-the-board adjustments given to other members of the unit.

Section F. Security. The University agrees not to use the provisions of program reduction or fiscal exigency to eliminate the position during the period of the fixed-term contract.

Section G. Early Retirement Incentives. The University may, at its initiative, announce an early retirement incentive program. Any tenured faculty member may apply to the Provost through the Department Chair and School Dean for early retirement. Eligibility requirements will be clearly stated. The University may put together a program which has the following features.

1. All eligible faculty who wish to will be granted early retirement;
2. A range for the total financial value of the plan will be stated. The minimum and maximum of the range shall be expressed in terms of percentages of eligible faculty's nine-month salary rate, and the maximum range shall be one-half of a nine-month salary;
3. The specific components of an individual plan will be as negotiated by the University and an individual, and may include (but are not limited to) cash, deferred cash, extended health benefits, extended post-retirement teaching, sunset sabbaticals, and summer employment.

Article 15. ACADEMIC REGALIA

The parties agree that departments, at the discretion of and with the agreement of the members, may reimburse members for the cost of rental of academic regalia used at the annual University commencement. Reimbursement will be made from the departmental services and supplies budget as funds are available. No other funds may be used for purposes of this Article.

Article 16. NON-DISCRIMINATION

There shall be no discrimination on the part of either the University or the Association because of age, race, color, sexual orientation, disability, national origin, or political or religious belief of any employee. The Association supports the policy of Equal Employment Opportunity and Affirmative Action as expressed in Presidential Executive Order #11246, as amended by Presidential Executive Order #11375. The Association agrees to assist the University in the implementation of its Affirmative Action and Equal Employment Opportunity policies.

Article 17. GRIEVANCE PROCEDURE AND ARBITRATION

Section A. Intent.

- 1 It is the objective of the University and the Association to encourage the fair and equitable resolution of grievances. Upon request, each party to a grievance shall promptly make available to the others all known relevant facts and information.
2. The orderly processes herein set forth are intended to be the sole method used for resolution of grievances, as that term is herein defined. Nothing contained in this Article is intended to preclude the use of the procedures outlined in the Faculty Constitution, its Bylaws, or the Oregon Administrative Rules. However, if a member seeks resolution of a dispute/grievance through any agency other than provided in this Article prior to seeking resolution of the dispute/grievance through presenting a grievance under this Article or while grievance proceedings are in progress, the University shall have no obligation to entertain nor proceed further with the matter pursuant to the provisions of this Article.

Section B. Definitions.

- 1 A grievance is a claim that the terms of this Agreement have been violated, misrepresented, or misapplied or that procedural steps in matters of appointment, reappointment, or promotion have not been followed. The term "grievance" shall not include complaints relating to matters of academic judgment. For the purposes of this Agreement, the term "academic judgment" shall mean the judgment of academic authorities, including teaching faculty and administrators, as to (a) the procedures, criteria and information to be used in making determinations as to appointment, reappointment, promotion, three-year extendable contracts and tenure; and (b) whether to recommend or grant appointment, reappointment, promotion, three-year extendable contracts or tenure to a particular individual on a basis of such procedures, criteria and

information. For the purposes of arbitration, the term “grievance” shall not include complaints related to discrimination on the basis of religion, gender, sexual orientation, race, color, national origin, age, disability, or marital status.

2. “University calendar day” shall mean a day when registration, classes, or examinations are scheduled in accordance with the official university calendar

Section C. Presentation of Grievance.

1 Informal Presentation.

- a. A member or a group of members may present a grievance personally or, upon written request, may be represented by the Association. Members are encouraged to attempt to settle grievances informally. If members are unable to settle the grievance during this informal presentation and want to pursue the grievance further they shall inform the Association. The Association may present a grievance and shall be entitled to representation at all informal presentations. All such presentations must be made within twenty (20) university calendar days following the date upon which the members had or could have been reasonably expected to have had knowledge of the action, event, or commencement of the condition which is the basis of the grievance.
- b. The President or designee, not a member of the bargaining unit, shall render a written decision within twenty (20) university calendar days if so requested by the Association. Such a request must be made by the Association within twenty (20) university calendar days after the last informal presentation.
- c. Any settlement, withdrawal, or other disposition of a grievance through the informal presentation shall not be considered a binding precedent in the disposition of subsequent grievances.

2 Formal Grievance Procedure.

a. Filing a Formal Grievance.

Formal grievances must be filed by the Association in the President’s Office within twenty (20) university calendar days after receipt of the President’s written decision at the informal grievance level, or within twenty (20) days after the last informal presentation. Formal grievances must be initiated by submitting relevant facts to the President on the grievance form as set forth below. Use of this form in no way precludes the submission of other relevant facts later during the grievance and arbitration process.

Grievance Form:

1. Name of employee(s) grieved.
2. Date(s) alleged grievance occurred.
3. Name(s) of administrator(s) involved in violation of Agreement on which grievance is based.
4. Article and Sections of Agreement which were violated (quote specific language):
5. Summary and explanation of grievance:
6. Witnesses.
7. Documents (identify and attach):
8. Remedy requested.

Dated this _____ day of _____, 199__.

Signature(s) of grieved _____

Signature of Association _____

b. Formal Grievance Steps.

Any step(s) of the formal grievance procedure may be waived by mutual consent of the parties. A written request from one party and a written confirmation by the other shall constitute mutual consent for such waivers.

Step I. The Dean of the school will hear the grievance within twenty (20) university calendar days of its presentation and render a decision in writing to the Association within ten (10) university calendar days of the hearing. If there is no incumbent Dean of the school, the Association shall proceed to Step II below

Step II. If the Association is not satisfied with the decision at Step I, the Association may present the grievance in writing to the Provost within five (5) university calendar days after receiving the decision from the Dean of the school. The Provost will hear the grievance within ten (10) university calendar days if the Dean of the school has heard the grievance and twenty (20) university calendar days if not and will render a decision in writing to the Association within five (5) university calendar days of the hearing.

Step III. If the Association is not satisfied with the decision at Step II, the Association may present the grievance in writing to the President of the University within five (5) university calendar days after receiving the decision from the Provost. The President, or a designee not hearing the grievance at Steps I and II, will hear the grievance within ten (10) university calendar days and will render a decision in writing to the Association within ten (10) university calendar days of the hearing.

Step IV If the Association is not satisfied with the decision at Step III, the Association may present the grievance in writing to the Chancellor of the Oregon University System with copies to the Vice Chancellor for Finance and Administration, the Associate Vice Chancellor for Finance and Administration, the Associate Vice Chancellor for Human Resources, and the President within ten (10) university calendar days after receiving the decision from the President. The Chancellor, or the Chancellor's designee, will render a decision in writing to the Association within twenty (20) university calendar days.

3 General Provisions as to Grievances.

- a. Failure by the administration to communicate a decision on a grievance at any step short of arbitration within the stated time limits, including any extensions thereof, shall be deemed agreement to grant the remedy sought. Failure by the Association to proceed to the next step within the stated time limits, including any extension thereof, shall be deemed an acceptance of the decision rendered at that step.
- b. Neither the University nor the Association shall take reprisals against any member for participating in a grievance procedure.

Section D. Communication. Whenever written grievances, answers, decisions, or appeals are required as herein outlined, they shall be sent by certified mail or delivered to the following in person:

1. The President of the University;
2. The President of the Association.

Section E. Arbitration

1. If the grievance is not resolved at the Chancellor's level, the grievant or the Association may, within thirty (30) university calendar days of the receipt of the written response from the Chancellor's office, submit the issue to arbitration. Any demand for arbitration shall be in writing, shall specify the issue in detail, and shall be sent by certified mail to the Chancellor and the Employment Relations Board. The arbitrator shall be chosen pursuant to the Voluntary Arbitration Rules then prevailing of the American Arbitration Association or from a list of five (5) arbitrators obtained from the Oregon Employment Relations Board.
2. The arbitration hearing shall be conducted pursuant to the Voluntary Arbitration Rules then prevailing of the American Arbitration Association.
3. The arbitrator's fees and other expenses, including the preparation of a transcript, shall be shared equally by the parties. Expenses of witnesses, if any shall be borne by the party calling the witness.

4. **Authority of the Arbitrator**

- a. The arbitrator shall neither add to, subtract from, nor modify the terms of this Agreement. The arbitrator shall confine the decision solely to the application and/or interpretation of this Agreement and to whether procedural steps in matters of appointment, reappointment, and promotion have been followed. The arbitrator shall refrain from issuing any statements of opinion or conclusions not necessary to the determination of the issue submitted.
- b. In cases involving the exercise of “academic judgment,” the arbitrator shall not substitute personal judgment for that of the official making such judgment, but shall confine the determination to whether procedural steps have been followed. If the arbitrator determines that procedural steps have not been followed where an exercise of “academic judgment” is involved, the arbitrator shall direct that the matter be reconsidered by the appropriate official in accordance with relevant procedural steps.
- c. In any proceeding, the first matter to be decided is the arbitrator’s jurisdiction to act, which decision the arbitrator shall announce. Upon concluding that he/she has no such power, the arbitrator shall make no decision or recommendation as to the merits of the grievance. Upon concluding that the issue is arbitrable, the arbitrator shall normally proceed with the hearing at that time. Either party may seek judicial review of the arbitrator’s decision as to jurisdiction and have the hearing on the merits of the grievance delayed until such review is completed.

5. **Time and Place of Hearing.** The arbitrator shall hold the hearing within fifteen (15) university calendar days of acceptance of the selection or as soon thereafter as practicable, and shall issue a decision within thirty (30) university calendar days of the hearing unless additional time is agreed to by both the parties.

6. An arbitrator’s award may or may not be retroactive as the equities of each case may demand, but in no case shall an award be retroactive to a date earlier than forty (40) calendar days before the date the grievance was initially filed in accordance with this Article or the date on which the act or omission occurred, whichever is later

7. The award of the arbitrator shall be final and binding upon “OSBHE,” the Association and the Grievant(s) involved to the extent permitted by and in accordance with applicable law and the Article.

Article 18. FACULTY-ADMINISTRATION RELATIONSHIPS

In the future, no nonmember of the bargaining unit will be given rank in an academic discipline, promotion in rank in an academic discipline or tenure in a department without the affirmative written recommendation of the department acting in accordance with established departmental criteria and procedure.

Nothing in this section shall be construed to change the current status of present nonmembers nor shall it prohibit designation of rank or award of indefinite tenure without departmental designations.

Article 19. WORKING CONDITIONS

1 Support Staff.

- a. The University will give high priority to providing additional clerical positions in the teaching units. Within budget constraints, strong emphasis will be placed on upgrading those schools which currently have low clerical staff as measured by the clerical FTE and the ratio of faculty to clerical.
- b. In the event that an academic department's support staff is absent for an extended period of time, thus adversely affecting the department's operations, the University will provide temporary help during such absence. Requests for such help will be through the Department Chair to the Dean or Director and then to the Provost.
- c. The University agrees to provide courtesy identification cards to the spouse of any member making an appropriate request to the Business Office.

2 Work Load. Both parties recognize that institutional past practice in the matter of typical faculty loading has been to assign the equivalent of twelve (12) credit hours a term (36 per year) in instruction and three (3) credits for advising, plus other duties specified in the standard individual contract.

3 Adjunct Hiring. Both parties acknowledge the necessity of staffing flexibility through the hiring of adjunct faculty for short-term instructional needs. Both parties also acknowledge that the long-term interests of departments are served by having permanent staff who are fully involved in the life of the department and are compensated fairly for the work they perform. It is the University's intent to strengthen its permanent faculty as it can, within the constraints of its budget. The Association and the University agree that the efforts of adjunct faculty should be recognized and that to the degree practicable they should participate actively in the life of departments.

Article 20. NOTICES AND COMMUNICATIONS

Customary or required notices or communications, unless otherwise provided herein, shall be sent as follows.

FOR THE ASSOCIATION

**President
Association of Professors
Southern Oregon University
1250 Siskiyou Boulevard
Ashland, Oregon 97520**

FOR THE UNIVERSITY

**President
Southern Oregon University
1250 Siskiyou Boulevard
Ashland, Oregon 97520**

and

**Chancellor
Oregon University System
Post Office Box 3175
Eugene, Oregon 97403**

FOR THE STUDENTS:

**President, ASSOU
SU 321
Southern Oregon University
1250 Siskiyou Boulevard
Ashland, Oregon 97520**

Institution Information. Upon written request to the Provost signed by the President of the Association, or a designee, the University will provide to the Association a copy of official published records, files, studies and other papers which are public records, but excluding working papers and other material exempted by state law or presently exempted by the Administrative Rules of the Oregon State Board of Higher Education. Copies will ordinarily be furnished without charge, but the University reserves the right to make charges reasonably calculated to recover its file search and reproduction costs.

The University will also provide to the Association, in advance of meetings of the State Board of Higher Education or its standing committees, agenda which contain any proposed changes to its Administrative Rules.

Article 21. TOTALITY OF AGREEMENT

The parties acknowledge that during the negotiations which resulted in this Agreement, the Association and the University had the unlimited right and opportunity to present demands and proposals with respect to any and all matters lawfully subject to collective bargaining, and that all of the understandings and agreements arrived at thereby are set forth in this Agreement between the parties for its duration. The parties further assert that all obligations and benefits contained in this contract are the result of voluntary agreement.

Therefore, the Association and the University, during the term of this Agreement, voluntarily and unqualifiedly waive the right, and agree that the other shall not be obligated, to bargain collectively on any subject or matter covered by this Agreement even though such subject or matter may not have been within the knowledge or contemplation of the parties at the time they negotiated or signed this Agreement.

Article 22. SEPARABILITY

Notwithstanding the provisions of ORS 243 702, Section 1, it is the expressed intent of the parties that in the event any provision of this Agreement shall at any time be declared invalid by any court of competent jurisdiction or through government regulation or decree, such decision shall not invalidate the entire Agreement. All other provisions not declared invalid or not incomparable therewith shall remain in full force and effect.

Article 23. NEGOTIATION OF SUCCESSOR AGREEMENT

For the purposes of negotiating a successor Agreement, APSOU and the University will meet between January 1, 1999, and April 30, 1999, to begin negotiations of a Successor Agreement. APSOU will send written notice to the University within fifteen (15) calendar days after the meeting specifying those subjects, sections, or articles it proposes to open for negotiations. Fifteen (15) calendar days after the University receives APSOU's request, the University will send written notice to APSOU specifying those subjects, sections or articles it proposes for negotiations. Those sections of this Agreement not reopened by said notices or by subsequent mutual agreement shall automatically become part of any Successor Agreement. Negotiations of the Successor Agreement shall begin no later than fifteen (15) days after APSOU receives the University's notification, or such date thereafter as may be mutually agreed upon by the parties.

Article 24. COPIES OF AGREEMENT

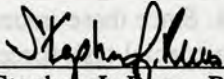
Within thirty (30) days of the signing of this Agreement, the University will send a copy of the Agreement to each member, send twenty-five (25) additional copies to the President of APSOU, send five (5) copies to the President of ASSOU, and provide a copy to each new member upon hiring. The cost of the printing of the Agreement shall be shared equally by both parties of the Agreement.

Article 25. TERM OF AGREEMENT

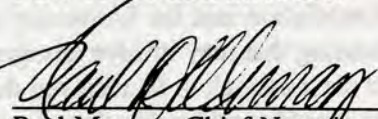
This Agreement shall be in full force and effect from the date of ratification by both parties to and including August 31, 1999

FOR THE UNIVERSITY

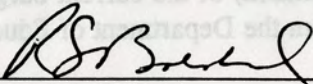
FOR THE ASSOCIATION




Stephen J. Reno, President



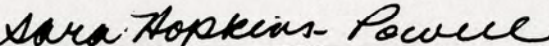
Paul Murray, Chief Negotiator



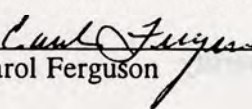
Ronald S. Bolstad



Michael Turner



Sara Hopkins-Powell

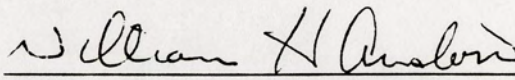


Carol Ferguson

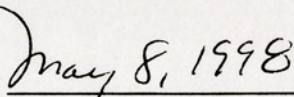


Joe Sicotte, Chief Negotiator

The State of Oregon, Acting By and
through the State Board of Higher Education
on behalf of Southern Oregon University



William H. Anslow, Vice Chancellor for
Finance and Administration



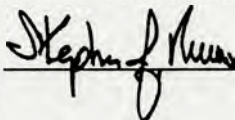
Date

Memorandum of Understanding
between
Southern Oregon University
and
The Association of Professors, Southern Oregon University

The Association and the University agree that the Department of Education is undergoing a curricular restructuring that may involve changes in the schedule and type of work of this unit. Since these issues are not yet clear enough to be resolved during this bargaining session, we agree that a special task force will meet to identify and resolve these issues. The agreement will be completed by July 1, 1998. The task force will be made up of two current members (one APSOU and one management) of the current bargaining team and the Associate Dean for Education and one faculty member from the Department of Education.

For the University

For the Association:





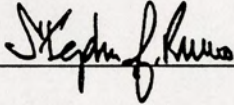
Date

**Memorandum of Understanding
between
Southern Oregon University
and
The Association of Professors, Southern Oregon University**

The Association and the University agree to reopen negotiations on the issue of domestic partners when a decision is reached by the Attorney General.

For the University:

For the Association:





Date