

Policy Title:	Administrators with Tenured Faculty Status
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Governing Body:	Southern Oregon University	Policy Number:	AAD.037
Policy Contact:	Provost	Date Revised:	May 2021
Custodial Office:	Provost	Date Approved:	June 2021
Approved By:	President	Next Review:	April 2023
Related Policy:			

Revision History

Revision Number:	Change:	Date:
	Initial version	January 2011
1	Revision	May 2021

I. Purpose

The purpose of this policy is to establish the method for administrators with tenure rights to return to the faculty or otherwise receive appropriate retirement incentives at the time that they relinquish their tenure rights.

Because Section III.B of this policy is intended to allow administrators the opportunity to exchange their tenure rights for early retirement incentives that are substantially the same as those they would otherwise receive if they were to return the faculty, it is the university’s intent that this policy will be revised in the event the incentive program available to faculty is materially revised or eliminated.

II. Definitions

For purposes of this policy, employees who were working under a three-year extendable contract at the time that they accepted an administrator position shall have the same rights under this policy as faculty with tenure rights.

III. Policy Statement

A. For faculty that took administrative positions who wish to return to their faculty position.

1. Administrators will return to the faculty at the rank held before assuming an administrative position, or the appropriate rank if promoted through the faculty Bylaws process while holding an administrative position, and will be given all step increases that would have been earned as a faculty member during their administrative assignment. For example, a faculty member entering an administrative position at Professor, Step 4, and serving for four years in an administrative position will return to the faculty at Professor, Step 8.

2. The years served during the administrative position will count towards a sabbatical leave upon return to the faculty.

3. If the administrator serves for three years, an additional adjustment of \$1,000 for each year of service, up to seven years (at a maximum of \$7,000), will be added annually to the rank and step of the returning faculty member beginning September 16 of the year in which they return to faculty service.

4. If the administrator has served at least three years and is not eligible for a sabbatical leave upon return to the faculty, and will assume teaching duties in the term following a decision to return to the faculty, they may request release time equivalent to 0.25 per term during the first year to prepare for teaching, scholarship, and service.

5. For qualified administrators with prior tenure rights that are hired externally, their eligibility for tenure at SOU, as well as rank and step, will be determined at the time of hire.

6. Administrators are not eligible to receive the pay adjustment established in this Section A.3 of this policy without returning to the faculty. Administrators waive their claim to benefits under Section B when they re-enter the faculty.

B. Retirement by Administrators with Faculty Tenure Rights.

1. Administrators who return to the faculty ordinarily return to the collective bargaining unit of the Associated Professors of Southern Oregon University (APSOU) and have the opportunity to relinquish their tenure status under Article 14 of the APSOU Collective Bargaining Agreement if they choose that path.

2. Administrators with Tenured Faculty Status may similarly waive their right to return to the faculty and relinquish tenure. To do so, they may retire as administrators so long as they submit their application to the Office of the President or Provost at least ninety days and not more than three years prior to the proposed date of retirement. This option is only available to administrators who have tenure to relinquish were they to return to the faculty.

3. Administrators who relinquish their tenure must be at least fifty-five (55) years of age on the effective date of their relinquishment and been employed at SOU a minimum of five years.

4. Administrators who receive notice of non-renewal or termination shall, upon receipt of the notice, be deemed to have submitted a timely application for relinquishment upon delivery of the notice. Moreover, the President or Provost retains discretion to deny relinquishment benefits under this policy to administrators who have received notice of non-renewal or notice of termination for cause. In addition, any administrator terminated for cause after applying for relinquishment and before their final date of employment becomes ineligible for relinquishment benefits.

5. Approval of the administrator's relinquishment application is subject to the discretion of the President or Provost, as appropriate to the impacted budget or the impact on relevant departments or divisions. Considerations relevant to the decision may include, but are not limited to, the budget impacts and timing of pay increases and other benefits not included in the current budget cycle. Any applicant who is denied relinquishment shall be given priority among administrators applying for relinquishment the following year. Relinquishment applications submitted by administrators are not included in the total discounted value of liability computed for faculty relinquishments.

6. Administrators approved for relinquishment shall sign an agreement relinquishing tenure that shall be irrevocable upon execution by all parties.

7. Salary Adjustments: Administrators relinquishing tenure will receive a one-time addition to their base salary in an amount equal to 6% of the adjusted faculty floor salary (9-month minimum floor salary rate plus disciplinary adjustment, prorated for FTE, based on the administrator's current faculty rank plus the year(s) in rank that would have been added had they remained in the faculty) for the prior January. This is the same amount that the administrator would have received had they returned to the faculty to relinquish tenure. This addition will be effective on July 1 following the submission of their relinquishment application. Administrators continue to receive other cost of living adjustments up to their retirement date.

8. Upon retirement, such administrators will receive health and dental benefits through the PEBB Retiree Program for up to seven (7) years, or until the employee reaches age sixty-five (65), whichever comes first. The benefit amount is fixed at the full premium amount for the employee or employee/spouse tier effective at the time of retirement. If the cost of health insurance increases beyond this total, retirees will be expected to pay the difference. Accepting other employment that offers comparable health benefits cancels the University's obligation to provide health benefits. It shall be a condition of the receipt of the University's health benefits that the retiree must inform the University whether or not they have accepted other employment that offers comparable health benefits. If a retiree dies before the end of the effective period of the health benefits, their dependents will receive health benefits, as described above, until the effective period is completed.

9. In the alternative, a retiring administrator with Tenured Faculty Status may waive the benefit identified in Section 8 above, and elect instead to receive a one-time cash payment equivalent to 25% of the projected cost for health benefits being waived. Should the retiree return to work in a benefits eligible position, benefits continue to be waived, until the employee reaches the age of 65. This option does not preclude retiree self-enrollment into eligible Federal and State benefit programs, including the PEBB Retiree Program until age 65. To exercise this option, the administrator with Tenured Faculty Status must provide notice of their election of the cash payment option no less than twelve months prior to their last day of employment at the university.

D. Policy Consultation

Faculty Senate, Director's Council, Business Affairs Council, Provost, President, President's Executive Cabinet and Policy Council. Policy was posted on June 3, 2021 for community comment.

All revisions to this policy supersede all prior versions of this policy and are effective immediately upon approval by the University President. The Policy Contact, defined above, will write and maintain the procedures related to this policy and these procedures will be made available within the Custodial Office.