

**Memorandum of Understanding  
between  
University of Oregon  
and  
United Academics of the University of Oregon, AFT/AAUP, AFL-CIO  
regarding  
Third-Year Post-Tenure Reviews (Article 20)**

This Memorandum of Understanding (“MOU”) is entered into by and between University of Oregon (“University”) and United Academics (“Union”), collectively referred to as “the parties.”

**WHEREAS**, in August 2022 the parties ratified a successor agreement with a new framework for post-tenure reviews; and

**WHEREAS**, the parties recognize the need to simplify post-tenure reviews to the extent possible while ensuring that tenured faculty are demonstrating evidence of continued development in their teaching, research, and service; and

**WHEREAS**, the parties recognize the need to clarify the new third-year post tenure review processes;

**THEREFORE**, the parties agree as follows:

**Agreement 1. Third-Year Review Clarification.** Article 20 Tenure Review and Promotion, Section 30 Third-Year Reviews will be deleted in its entirety and replaced with the language below:

**Section 30. Third-Year Reviews.** Third-year reviews will be informal reviews unless a department head and dean agree, or the Office of the Provost determines, that a formal review is necessary for the faculty member to meet expectations for a subsequent review.

a. **Informal Third-Year Reviews.** The informal third-year post-tenure review is conducted by the appropriate department or unit head with the bargaining unit faculty member. Informal review materials will typically consist of a curriculum vitae, personal statement, materials for the evaluation of teaching (where applicable), and a sabbatical report (where applicable) (Section 33). As a result of the review, the department or unit head will prepare a concise statement and share it with the bargaining unit faculty member, who will have 10 business days to respond in writing. The review materials, head’s statement, and faculty response are then sent to the dean and then to Office of the Provost for approval. The head’s statement and any response will be placed in the bargaining unit faculty member’s personnel file. If in the process of the informal review, the department or unit head and dean agree, or the Office of the Provost determines, that a formal review is necessary to meet expectations on a subsequent review, they will initiate the Formal Review process

below and notify the faculty member. If a formal review is initiated, the statement and response will become part of the formal review dossier.

- b. **Formal Third-Year Reviews.** This process applies to associate and full professors who undergo a formal third-year post-tenure review. The department or unit head will convene a faculty personnel committee (if one does not already exist in the department or unit) that will review a faculty member's work in relation to the unit-level post-tenure review criteria, or the criteria in Section 38. If unit-level policies require a vote, the tenured department faculty with the same or higher rank, not including the candidate, will vote to endorse the committee's report and recommendation. The department or unit head will write a separate report in light of the materials gathered and the faculty committee's report and, if required, the faculty vote. The department or unit head will meet with the faculty member and will provide a copy of the head's report and the redacted faculty committee's report. The faculty member will have 10 business days from the date of the receipt of the report to provide responsive material or information, which shall be included in the evaluation file. These will be reviewed by the dean and the Office of the Provost. If the result of the review is to recommend a development plan, then the head and faculty member will develop one in consultation with the dean to be approved by the Office of the Provost (Section 37).

**Agreement 2. Development Plans and Duties Restoration.** Article 20 Tenure Review and Promotion, Section 37 Development Plans will be amended with a new paragraph with the language below:

A bargaining unit faculty member who has had their FTE or duties adjusted as the result of an unsuccessful development plan may elect to have their standard workload restored if, on a subsequent post-tenure review, they meet or exceed expectations in the areas in which the faculty member had previously been determined not to have met expectations. If the faculty member meets or exceeds expectations as outlined in the unit policies, they may, if they so choose, resume their standard workload the Fall following the year the post-tenure review was initiated.

**Knowing and Voluntary.** The parties acknowledge that they have carefully read and fully understand the terms of this MOU, and that they are voluntarily entering into this MOU.

**Effective Date.** The parties agree that this MOU will be effective on the date at which all parties have signed below.

**Entire Agreement.** The parties' collective bargaining agreement and this MOU represent the parties' entire agreement with respect to the subject matter discussed in this MOU. Except as described in this MOU, there were no inducements or representations leading to the execution of this document.

**Disputes.** Any disputes arising from the interpretation, implementation, or application of this MOU are subject to the grievance and arbitration provisions of Articles 22 and 23 of the CBA.

Mike Urbancic 13 SEP 2023

For the Union                      Date  
Mike Urbancic,  
President

Janet Woodruff-Borden

For the University                      Date  
Janet Woodruff-Borden  
Interim Provost and  
Executive Vice President

Chris Meade                      9/11/2023

Chris Meade                      Date  
Director, Employee and  
Labor Relations

**Addendum: Agreement 1 Changes (Key: Status Quo | New | Deleted)**

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<p><b>Article 20. Section 30. Third-Year Reviews.</b> Third-year reviews will be informal reviews unless a department head and dean agree, or the Office of the Provost determines, that a formal review is necessary for the faculty member to meet expectations for a subsequent major review.</p>	<p><b>Article 20. Section 30. Third-Year Reviews.</b> Third-year reviews will be informal reviews unless a department head and dean agree, or the Office of the Provost determines, that a formal review is necessary for the faculty member to meet expectations for a subsequent <del>major</del> review.</p>
<p><b>Article 20. Section 30.a. Informal Third Year Reviews.</b> The informal third-year review is conducted by the appropriate department or unit head with the bargaining unit faculty member. Informal review materials will typically consist of a curriculum vitae, personal statement, materials for the evaluation of teaching, and a sabbatical report (Section 33). As a result of the review, the department or unit head will prepare a statement and share it with the Dean and Office of the Provost for approval. The statement will then be shared with the bargaining unit faculty member, who may provide a written response within 30 days of receiving the statement. The statement and any response will be placed in the bargaining unit faculty member’s personnel file. If the department or unit head and dean agree, or the Office of the Provost determines, that a formal review is necessary to meet expectations on a subsequent major review, they will initiate the Formal Review process below.</p>	<p><b>Article 20. Section 30.a. Informal Third Year Reviews.</b> The informal third-year <del>post-tenure</del> review is conducted by the appropriate department or unit head with the bargaining unit faculty member. Informal review materials will typically consist of a curriculum vitae, personal statement, materials for the evaluation of teaching (<del>where applicable</del>), and a sabbatical report (<del>where applicable</del>) (Section 33). As a result of the review, the department or unit head will prepare a <del>concise</del> statement and share it with the <del>Dean and Office of the Provost for approval. The statement will then be shared with the</del> bargaining unit faculty member, who <del>will have 10 business days to respond in writing. The review materials, head’s statement, and faculty response are then sent to the dean and then to the Office of the Provost for approval. may provide a written response within 30 days of receiving the statement.</del> The head’s statement and any response will be placed in the bargaining unit faculty member’s personnel file. If <del>in the process of the informal review</del>, the department or unit head and dean agree, or the Office of the Provost determines, that a formal review is necessary to meet expectations on a subsequent <del>major</del> review, they will initiate the Formal Review process below <del>and notify the faculty member. If a formal review is initiated, the statement</del></p>

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	<p>and response will become part of the formal review dossier.</p>
<p><b>Article 20. Section 30.b. Formal Third Year Reviews.</b>  The department or unit head will convene a faculty personnel committee (if one does not already exist in the department or unit) that will review a faculty member’s work in relation to the unit-level post-tenure review criteria, or the criteria in Section 38. The tenured department faculty with the same or higher rank will vote to endorse the committee’s report and recommendation. The department or unit head will write a separate report in light of the materials gathered and the faculty committee’s report and faculty vote. The department or unit head will meet with the faculty member and will provide a redacted copy of the head’s report. The faculty member will have 10 days from the date of the receipt of the report to provide responsive material or information, which shall be included in the evaluation file. These will be reviewed by the dean and the Office of the Provost. If the result of the review is to recommend that a development plan is required and the Office of the Provost agrees, then the head and faculty member will develop one to be approved by the Office of the Provost (Section 37).</p>	<p><b>Article 20. Section 30.b. Formal Third Year Reviews.</b> This process applies to associate and full professors who undergo a formal third-year post-tenure review. The department or unit head will convene a faculty personnel committee (if one does not already exist in the department or unit) that will review a faculty member’s work in relation to the unit-level post-tenure review criteria, or the criteria in Section 38. If unit-level policies require a vote, the <del>The</del> tenured department faculty with the same or higher rank, <b>not including the candidate</b>, will vote to endorse the committee’s report and recommendation. The department or unit head will write a separate report in light of the materials gathered and the faculty committee’s report and, <b>if required, the</b> faculty vote. The department or unit head will meet with the faculty member and will provide a <del>redacted</del> copy of the head’s report <b>and the redacted faculty committee’s report.</b> The faculty member will have 10 <b>business</b> days from the date of the receipt of the report to provide responsive material or information, which shall be included in the evaluation file. These will be reviewed by the dean and the Office of the Provost. If the result of the review is to recommend <del>that</del> a development plan <b>is required and the Office of the Provost agrees</b>, then the head and faculty member will develop one <b>in consultation with the dean</b> to be approved by the Office of the Provost (Section 37).</p>

**Addendum: Agreement 2 Changes (Key: Status Quo | New | Deleted)**

<b>CBA (8/1/2022)</b>	<b>MOU</b>
<p><b>Article 20. Section 37. Development Plans.</b> If the Provost concludes that the bargaining unit faculty member’s performance does not meet expectations in one or more areas, the dean and the department or unit head shall consult with the bargaining unit faculty member and shall recommend to the Provost a development plan for demonstrable improvement in the area(s) at issue. The goal of the plan is to put the faculty member on track to meet expectations in that area or areas at their subsequent review. The development plan should be implemented no later than the first term of the academic year following the review. Development plans may require adjustment of professional responsibilities (e.g., reduced service or teaching in order to support more research) and must specify a follow-up review timeline.</p> <p>If a faculty member has a development plan, the criteria in the area(s) specified in the development plan will be in effect for those areas of the subsequent review. If the faculty member does not meet expectations in the specified area(s), the Provost may reduce the faculty member’s FTE associated with the specified area(s) or may establish a new development plan or both. If the faculty member’s FTE is adjusted, future reviews will reflect the adjustment of duties.</p>	<p><b>Article 20. Section 37. Development Plans.</b> If the Provost concludes that the bargaining unit faculty member’s performance does not meet expectations in one or more areas, the dean and the department or unit head shall consult with the bargaining unit faculty member and shall recommend to the Provost a development plan for demonstrable improvement in the area(s) at issue. The goal of the plan is to put the faculty member on track to meet expectations in that area or areas at their subsequent review. The development plan should be implemented no later than the first term of the academic year following the review. Development plans may require adjustment of professional responsibilities (e.g., reduced service or teaching in order to support more research) and must specify a follow-up review timeline.</p> <p>If a faculty member has a development plan, the criteria in the area(s) specified in the development plan will be in effect for those areas of the subsequent review. If the faculty member does not meet expectations in the specified area(s), the Provost may reduce the faculty member’s FTE associated with the specified area(s) or may establish a new development plan or both. If the faculty member’s FTE is adjusted, future reviews will reflect the adjustment of duties.</p> <p><b>A bargaining unit faculty member who has had their FTE or duties adjusted as the result of an unsuccessful development plan may elect to have their standard workload restored if, on a subsequent post-tenure review, they meet or exceed expectations in the areas previously determined to not</b></p>

<b>CBA (8/1/2022)</b>	<b>MOU</b>
	meet expectations. If the faculty member meets or exceeds expectations as outlined in the unit policies, they may resume their standard workload the Fall following the year their post-tenure review was initiated.