

ARTICLE 22
SABBATICALS

22.1 Sabbatical Policy.

(a) Sabbatical leaves contribute significantly to the quality and success of research universities. Such leaves provide eligible faculty members with the opportunity to take a period of time for professional renewal, planned travel, study, formal education, research, writing, faculty development, certification, or other experience of professional value. Such sabbaticals are granted to increase a faculty member’s value to the University and shall be subject to the eligibility, application, and selection criteria set forth below.

(b) Types of Sabbaticals.

(1) Non-Competitive Two-Semester Sabbaticals. The Trustees shall make available to each faculty member who has met the eligibility criteria and whose application has been reviewed by the University, a sabbatical for two (2) semesters at half-pay. The sabbatical may be taken during both semesters of one (1) academic year or during any mutually agreeable two (2) semesters over consecutive academic years.

(2) Competitive One-Semester Sabbaticals. In addition, sabbaticals at full pay for one semester shall continue to be offered on a competitive basis. For 2009–10 only, the Trustees shall offer to eligible faculty members at least forty-one (41) sabbaticals at full pay for one (1) semester. The number of one-semester full-pay sabbaticals for subsequent years shall be renegotiated as soon as practicable pursuant to Article 36, Amendment and Duration.

(3) The full-pay sabbaticals shall be apportioned proportionately among colleges and administrative units equivalent to colleges (hereafter, “college”). For purposes of apportionment, a faculty member in an administrative unit of fewer than twenty (20) faculty members shall be considered as part of the college closest in discipline. Competitive full-pay sabbaticals shall be apportioned among the colleges according to their proportion of eligible faculty, for 2009-2010 only, as follows:

Business Administration — at least four (4) one-semester sabbaticals.

Design, Construction, and Planning — at least two (2) one-semester sabbaticals.

Education — at least two (2) one-semester sabbaticals.

Engineering — at least six (6) one-semester sabbaticals.

Fine Arts — at least two (2) one-semester sabbaticals.

Health and Human Performance — at least two (2) one-semester sabbaticals.

Journalism — at least two (2) one-semester sabbaticals.

Libraries — at least two (2) one-semester sabbaticals.

Liberal Arts and Sciences — at least eighteen (18) one-semester sabbaticals.

Museum of Natural History and all others — at least one (1) one-semester

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sabbatical.

- (c) No faculty member shall be retaliated against for having taken a sabbatical.

22.2 Eligibility for Sabbaticals.

(a) Full-time tenured faculty members with at least six (6) years of full-time service at the University who have not taken a sabbatical within the last six (6) years shall be eligible for sabbaticals.

(b) A faculty member who is compensated through a contract or grant may receive a sabbatical only if the contract or grant allows a sabbatical and the faculty member meets all other eligibility requirements.

(c) Eligible faculty members shall be notified annually no later than February 28 regarding eligibility requirements and application deadlines.

22.3 Application and Selection.

(a) Submission Deadline. Applications for sabbaticals shall be submitted in accordance with the provisions of this Agreement to the chair or equivalent administrator (hereafter, “chair”) of the faculty member’s department or equivalent unit (hereafter, “department”) by October 15.

(b) Simultaneous Application. If a faculty member is willing to accept a two (2)-semester half-pay sabbatical when he/she is unsuccessful in obtaining a one (1)-semester full-pay sabbatical, the faculty member may apply simultaneously with a single application for each type of sabbatical. The faculty member must so indicate on the application, in a separate part of the application that shall not be forwarded to the selection committee. If the faculty member applies for each type of sabbatical and is not awarded a one (1)-semester full-pay sabbatical, he/she will be awarded a two (2)-semester half-pay sabbatical, assuming the application is in order.

(c) Contents of Application. Each application shall include the following:

- (1) the applicant’s name;
- (2) the applicant’s department;
- (3) the number of years of full-time service at the University;
- (4) the type of sabbatical requested and the semesters that the sabbatical is requested for;
- (5) the dates of all previous sabbaticals taken;
- (6) a brief (one page) statement describing the planned activities while on sabbatical, specific results anticipated from the leave, and any anticipated supplementary income; and

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(7) a signed and dated statement that the applicant agrees to comply with the conditions of the sabbatical program as described in Section 22.5.

(d) Chair's Ranking. The chair shall assess and rank the applications and report the ranking of each application and a brief rationale for the ranking on the application.

(e) Elected Selection Committee. In each college, a committee shall be elected by and from the tenured full-time faculty. The committee members shall elect the committee chairperson.

(f) Committee's Ranking Procedure. If there are more applicants for full-pay sabbaticals than there are such sabbaticals available in the college, the committee shall rank the applications.

(1) Ranking.

a. The fact that an applicant has applied for a particular type of sabbatical or for more than one type of sabbatical must not be considered in any way in the committee's ranking of the merits of the applicant's case.

b. In ranking the application, the committee shall consider the benefits of the proposed sabbatical to the faculty member, the University, and the profession and the chair's ranking of the application.

c. The committee shall rank the merit of the applications by allocating points as follows: The highest ranked application (and ties) shall be allocated five (5) points; the second highest application (and ties) shall be allocated four (4) points; and so on.

(2) The committee shall submit the ranked list of recommended faculty members to the dean or equivalent administrator (hereafter, "dean") or designee.

(g) Dean's Decision. The dean or designee shall make the final decision from the list and consult with the committee prior to awarding a sabbatical that does not follow the committee's ranking. The dean shall not be informed whether a candidate has applied for more than one type of sabbatical until after the decision has been made about the awarding of full-pay sabbaticals.

(h) Notification of Awards.

(1) The dean or designee shall announce the sabbatical decisions to applicants no later than January 31.

(2) A faculty member who is awarded a sabbatical must notify the chair and the dean before February 15, or two (2) weeks after receiving the notification, whichever is later, if they are able to accept the sabbatical.

(3) A faculty member may decline an awarded sabbatical and reapply in a subsequent year without prejudice. A faculty member may also postpone an awarded sabbatical, in which case the faculty member does not reapply but simply takes the sabbatical in a subsequent year approved by the chair and dean.

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(4) If a faculty member who has been awarded a competitive sabbatical declines or postpones the sabbatical, it shall be awarded to the faculty member who was ranked next highest in the college.

22.4 Implementation of Awarded Sabbaticals.

(a) Sabbaticals at half-pay shall be granted unless the application has failed to satisfy the requirements of subsections 22.3(a)–(c) or unless awarding more than one (1) sabbatical in a department would result in irresolvable staffing problems that preclude such sabbatical from being granted at the time envisioned.

(1) In this latter instance, the faculty member shall be provided the sabbatical the following year, or at a later time as agreed to by the faculty member and the Trustees or designee.

(2) The period of postponement shall be credited for eligibility for a subsequent sabbatical; that is, for a subsequent sabbatical the time counted since the previous sabbatical shall begin from the year the previous sabbatical was awarded, not the time it was eventually fully implemented.

(b) If only one (1) eligible faculty member in the department is awarded a sabbatical that year, the awarded sabbatical must be granted unless extraordinary circumstances result in irresolvable staffing problems precluding such sabbatical from being granted at the time envisioned.

(1) In this latter instance, the faculty member shall be provided the sabbatical the following year, or at a later time as agreed to by the faculty member and the Trustees or designee.

(2) The period of postponement shall be credited for eligibility for a subsequent sabbatical.

22.5 Terms of Sabbatical Program.

(a) While on sabbatical, the faculty member's salary shall be determined by the type of sabbatical the faculty member was awarded, as defined in Section 22.1(b)(1)–(3).

(b) The faculty member must return to the University for at least one (1) academic year following the completed implementation of the sabbatical. Agreements to the contrary must be reduced to writing prior to participation. Return to the University of salary received during the program may be required in those instances where neither of the above is satisfied.

(c) Faculty members shall not normally be eligible for another sabbatical until six (6) years of continuous service are completed following the awarding of the previous one.

(d) Contributions normally made by the Trustees to retirement and Social Security

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programs shall be continued on a basis proportional to the salary received. Trustee contributions normally made to employee insurance programs and any other employee benefit programs shall be continued during the sabbatical.

(e) Eligible faculty members shall continue to accrue annual and sick leave on a full-time basis during the sabbatical.

(f) While on leave, a faculty member shall be permitted to receive funds for travel and living expenses, and other sabbatical-related expenses, from sources other than the Trustees such as fellowships, grants-in-aid, and contracts and grants, to assist in accomplishing the purposes of the sabbatical.

(1) Receipt of funds for such purposes shall not result in reduction of the faculty member's University salary.

(2) Grants for such financial assistance from other sources may, but need not, be administered through the University.

(3) If financial assistance is received in the form of salary, the University salary shall normally be reduced by the amount necessary to bring the total income of the sabbatical period to a level comparable to the faculty member's current year salary rate.

(g) Employment unrelated to the purpose of the sabbatical leave is governed by the provisions of Article 29, Conflict of Interest and Outside Activity.

22.6 Sabbaticals for Faculty at the P. K. Yonge Developmental Research School.

(a) Policy. Sabbaticals for professional development shall be made available to faculty members at the P. K. Yonge Developmental Research School (hereafter, "PKY") who meet the requirements set forth below. Such sabbaticals are granted to increase a faculty member's value to PKY through enhanced opportunities for professional renewal, planned travel, study, formal education, research, writing, faculty development, certification, or other experience of professional value. No faculty member shall be retaliated against for having taken a sabbatical.

(b) Type and Number of Sabbaticals. Once every two (2) years the Trustees shall make available to eligible PKY faculty members at least one (1) sabbatical at either full pay for one (1) PKY semester or half-pay for one (1) PKY academic year, at the faculty member's option.

(c) Eligibility for Sabbatical.

(1) Full-time permanent-status faculty members with at least six (6) years of full-time service at PKY shall be eligible for sabbaticals.

(2) Eligible faculty members shall be notified annually no later than February 28 regarding eligibility requirements and application deadlines.

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(d) Application and Selection.

(1) Submission Deadline. Applications for sabbaticals shall be submitted in accordance with the provisions of this Agreement to the Director of PKY (hereafter, "Director") by October 15.

(2) Contents of Application. Each application shall include the following:

- a. the applicant's name;
- b. the number of years of full-time service at PKY;
- c. the semester that the sabbatical is requested for;
- d. the dates of all previous sabbaticals taken;
- e. a brief (one page) statement describing the planned activities while on sabbatical; and
- f. a signed and dated statement that the applicant agrees to comply with the conditions of the sabbatical program as described in Section 22.6(f).

(3) Elected Selection Committee. A three-member committee shall be elected by and from the permanent-status full-time faculty members for the purpose of making a recommendation to the Director regarding the awarding of the sabbatical. The committee members shall elect the committee chairperson.

(4) Committee's Ranking Procedure. If there are more applicants for full-pay sabbaticals than there are such sabbaticals available in the college, the committee shall rank the applicants.

a. Ranking.

- 1. In ranking the merit of the application, the committee shall consider the benefits of the proposed sabbatical to the faculty member, PKY, and the profession; and

- 2. The committee shall rank the merit of the applications by allocating points as follows: The highest ranked application (and ties) shall be allocated five (5) points, the second highest application (and ties) shall be allocated four (4) points, and so on.

b. The committee shall submit the ranked list of recommended faculty members to the Director.

(5) Director's Decision. The Director or designee shall make the final decision from the list and consult with the committee prior to a decision that does not follow the committee's ranking.

(6) Notification of Awards. The Director shall announce the sabbatical decisions to applicants no later than January 31. A faculty member who is awarded a sabbatical must notify the Director before February 15, or two (2) weeks after receiving the notification, whichever is later, if they are able to accept the sabbatical.

a. A faculty member may decline an awarded sabbatical and reapply in a subsequent year without prejudice. A faculty member may also postpone an awarded sabbatical, in which case the faculty member does not reapply but simply takes the sabbatical in a subsequent year approved by the Director.

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b. If a faculty member who has been awarded a sabbatical declines or postpones it, the sabbatical shall be awarded to the faculty member who was ranked next highest.

(e) Implementation of Awarded Sabbaticals. The awarded sabbatical must be granted unless the application has failed to satisfy the requirements of subsections 22.6(d)(1) and (2), above, or unless extraordinary circumstances result in irresolvable staffing problems precluding such sabbatical from being granted at the time envisioned.

a. If a sabbatical is not granted because of such extraordinary circumstances, the following two things must occur:

1. The faculty member shall be provided the sabbatical the following year, or at a later time as agreed to by the faculty member and the Director.

2. The period of postponement shall be credited for eligibility for a subsequent sabbatical; that is, for a subsequent sabbatical the time counted since the previous sabbatical shall begin from the year the previous sabbatical was awarded, not the time it was eventually fully implemented.

(f) Terms of Sabbatical Program.

(1) The faculty member must return to PKY for at least one (1) academic year immediately following the completed implementation of the sabbatical. Agreements to the contrary must be reduced to writing prior to participation. Return to PKY of salary received during the program may be required in those instances where neither of the above is satisfied.

(2) Faculty members shall not normally be eligible for another sabbatical until six (6) years of continuous service are completed following the awarding of the previous one.

(3) Contributions normally made by the Trustees to retirement and Social Security programs shall be continued on a basis proportional to the salary received. Trustee contributions normally made to employee insurance programs and any other employee benefit programs shall be continued during the sabbatical.

(4) Faculty members shall continue to accrue sick leave on a full-time basis during the sabbatical.

(5) While on leave, a faculty member shall be permitted to receive funds for travel and living expenses, and other sabbatical-related expenses, from sources other than the Trustees such as fellowships, grants-in-aid, and contracts and grants, to assist in accomplishing the purposes of the sabbatical.

a. Receipt of funds for such purposes shall not result in reduction of the faculty member's University salary.

b. If financial assistance is received in the form of salary, the University salary shall normally be reduced by the amount necessary to bring the total income of the sabbatical period to a level comparable to the faculty member's current year salary rate.

(6) Employment unrelated to the purpose of the sabbatical leave is governed by the provisions of Article 29, Conflict of Interest and Outside Activity.

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22.7 Annual Report on Sabbaticals.

(a) Each college (including the P. K. Yonge Developmental Research School) shall report in writing to the Provost on the results of the award process of sabbaticals for the ensuing school year. Not later than April 15 of each year, the Provost shall provide a complete report, by college, of the sabbatical results.

- (b) The reports shall include the following information for the college:
- (1) The number of faculty members who were eligible for a sabbatical;
 - (2) The number of applications for sabbaticals at half pay;
 - (3) The number of half pay sabbaticals awarded;
 - (4) The number of half pay sabbaticals accepted;
 - (5) The number of half pay sabbaticals accepted but deferred;
 - (6) The number of apportioned competitive sabbaticals at full pay;
 - (7) The number of applications for full-pay sabbaticals;
 - (8) The number of full-pay sabbaticals awarded;
 - (9) The number of full-pay sabbaticals accepted; and
 - (10) The number of full-pay sabbaticals accepted but deferred.

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