

# Sabbatical Leaves

## Guidelines & Tips for Successful Applications

- Definition and Purpose
- Collective Agreement Provisions
- Eligibility
- Application Procedures
- Lots and lots of Application Tips!
- Decisions
- Conditions

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## Preamble

Sabbatical Leaves are distinct from Professional Development and Education Leave. While Professional Development activities and the obtaining of credentials can be a component of Sabbatical Leave, they cannot be the primary focus. The Committee will be looking to evaluate a *clearly defined* program or project.

# Definition and Purpose

Sabbatical leaves—

- provide the “opportunity to maintain and enhance ... academic and professional competence free from normal on-campus teaching/professional and service obligations”
- “serve the objectives and goals of the University”
- are “intended to promote scholarly and/or professional activity through sustained periods of concentrated study, contemplation, and creative work”
- are intended “to promote the collaboration and exchange of knowledge and experiences”
- create “a positive impact on the professional, scholarly or creative productivity of the Member and on the programs at the University”

# TRU / TRUFA Collective Agreement

All definitions and rules regarding sabbatical leave eligibility and application procedures are found in Article 14 of the Collective Agreement.

The current agreement (2014-2019) can be accessed here:

[www.trufa.ca](http://www.trufa.ca)

Click on 'Collective Agreement' to read on-line or to download a .pdf version

# What Makes For a Successful Application?

- **A well defined project.** All aspects of the project must be clearly explained
- **A feasible project.** Peers have to have confidence in your ability to fulfill the proposed project (based on evidence presented in your CV and APARs)
- **A justifiable project.** You must be able to show that the project will further the discipline
- **A beneficial project.** You must show that the leave will benefit you, your department and TRU.

# Who is Eligible to Apply for Sabbatical Leave?

- Faculty Members in their sixth year of service at TRU may apply for a 12-month leave; those in their third year of service may apply for a 6-month leave.
- Successful applicants must be tenured prior to the start date of the sabbatical leave.
- Service is defined as TRU employment in one of the following appointment categories:
  - Limited Term Contract
  - Tenure-track appointment
  - Tenured appointment
- Unpaid leaves, previous sabbatical leaves and long-term disability are not credited as service

# Sabbatical Length, Start Dates and Salary

- 12 month sabbatical leave:
  - Can begin on July 1st or January 1st
  - 80% of salary\*
- 6month sabbatical leave:
  - Can begin on July 1st or January 1st
  - 100% of salary
- Pro-rated vacation days are assumed to be used by the member while on Sabbatical leave

\* Faculty have the option of buying back 20% pensionable service at the conclusion of the sabbatical leave.

# Application Procedures

➤ Use the sabbatical leave application form:

[http://www.tru.ca/research/services\\_faculty/sabbatical.html](http://www.tru.ca/research/services_faculty/sabbatical.html)

➤ The form contains three sections:

- Personal and employment information
- Purpose and benefits of proposed leave
- Sabbatical plan details

➤ The form must be submitted to the applicant's Department Chair no later than October 1<sup>st</sup> no matter the start date of the proposed leave.

# Tips for Completing the Application Form

- Be Clear and Concise
- Have a colleague review your application
- Include all of the required information:
  - Purpose
  - Benefit to you, your program and TRU
  - A clear and feasible plan: be as specific as possible

# Application Tips: Purpose

Purpose: Make sure the purpose is clearly stated

- Justify the purpose and provide evidence that you are able to carry out the project

For example, you may want to

1. Write a text book

- Why is a text book required?
- Indicate what other textbooks are available, why yours will meet an unfilled need, and/or what will distinguish your book from others on the market
- Do you have a publisher?

2. Carry out a research project

- Include evidence of your ability to do the research
- Cite previous studies and indicate your previous contributions to the area of study
- Position the proposed research within the field
- Articulate short and long-term objectives

# Application Tips: Purpose (cont'd)

## 3. Prepare a Teaching Module or Evaluation Tool

Your application must demonstrate that your project

- Undertakes more than normal course preparation
- Is innovative, shows awareness of state-of-the-art pedagogical work in your discipline, and will contribute to your field

And your application must justify the intended approach to teaching or evaluation

## 4. Develop a Creative Work

Your application must

- Clearly explain the nature of the creative work
- Explain why it is a timely contribution to the field
- Place the creative work in a broader context

# Application Tips: Intended Benefit

Some possible benefits of a sabbatical leave project:

- Advance a faculty member's research/scholarship/creative works program
  - Increasing the ability to make a significant contribution
  - Improving ability to compete for funding
  - Developing research collaborations
- Improve innovative teaching methodologies
- Develop significant partnerships in curriculum development and/or delivery
- Provide opportunities for student engagement and training
- Sustain or grow discipline or program after the sabbatical leave

The sabbatical project should not be seen as a "one-off" opportunity, but as part of a long-term sustainable program that is advanced significantly after the leave is complete.

# Application Procedures (cont'd)

The application form must be accompanied by

- A current *curriculum vitae*
- Annual Professional Activity reports from the three years prior to the application
- Report(s) submitted at the conclusion of any previous TRU sabbatical leave(s)

Applications must contain all required information and documents

The onus is on the applicant to provide a sufficiently detailed explanation of the purpose and benefits of the proposed leave and how the sabbatical plan will help the applicant meet that purpose and achieve those benefits.

# Application Tips: Supporting Documents

The *Curriculum Vitae* should be CLEAR and WELL ORGANIZED and should include

- Accurately cited publications: distinguish clearly among 'submitted,' 'accepted,' 'in press,' and 'published/in print.'
- Types of conference/workshop/colloquium presentations: invited, keynote, panel participation
- Record of internal and external funding
- Evidence of previous training of students
  - Community-based research
  - Honours students
  - Graduate students
- Membership in professional organizations and contributions to your discipline
- Industrial collaborations
- Committee service (include specific role on committee): internal and external to TRU

# Application Tips: The Sabbatical Leave Plan

- **Clear statement of the program/project: what you are going to do, how you are going to do it, and evidence that you are able to carry out the project**
  - Place the project within the context of the field (the broader field beyond TRU)
  - Indicate short-and long-term objectives
  - Provide a progress report on related research
  - Indicate how this will make a new or innovative contribution to the discipline
- **Evidence of track record (previous work, including report on previous sabbatical) or potential for a track record**

# Application Tips: Sabbatical Leave Plan (cont'd)

- Clear statement of the methodology, and indication that the methodology is feasible and appropriate to the program
- Anticipated outcomes: be specific as possible
- Plans for dissemination: be specific
  - Peer-reviewed publication
  - Creative work performance, exhibition or presentation
  - Seminars or workshops for peers
- Justify location of leave: at TRU or elsewhere
  - Going elsewhere has the benefit of broadening perspectives and collaborating more broadly

# Application Review Procedures

All sabbatical leave applications are reviewed by

- ▶▶ The Department Sabbatical Leave Committee
  - ▶▶ Five tenured members chaired by the department Chair
- ▶▶ The Faculty or School Dean
- ▶▶ The University Sabbatical Leave Committee
  - ▶▶ Chaired by the Associate Vice-President, Research & Graduate Studies
  - ▶▶ Includes “a sufficient number of tenured members appointed by Senate to adequately represent the range of disciplines, range of ranks, range of academic roles, and kinds of scholarly or professional work at the University, and one (1) non-voting Faculty Association observer”
  - ▶▶ Includes at least one member from the applicant’s Faculty/School

# Application Review

The Department and University Sabbatical Leave Committees review applications using the following criteria:

- ▶ **merits** of the proposed program of scholarly, professional and/or creative activities in terms of the **benefits** and/or **value** to the University and the Faculty Member;
- ▶ how the applicant's leave plan aligns with the **purpose** of sabbatical leaves;
- ▶ **feasibility** of the proposed program of scholarly, professional and/or creative activities in light of the Faculty Member's performance in the three years preceding the request; and
- ▶ **impact** on the budget and academic programs of the Department

# Application Tips: Other

Feasibility of Program: Your ability to carry out the proposed program:

- Is this the appropriate time in your career to be undertaking this program?
- Or do you have to establish a well documented track record first?
- Do you have the knowledge, expertise and experience to undertake work that will advance your field, either in scholarship or pedagogy?

Can you justify the program, indicate why it is important?

Have you obtained the funds necessary for carrying out the program?

Are equipment, facilities and other requirements accessible and available?

Has your sabbatical leave program, if required, been vetted by the Human Ethics or Animal Care committees?

# Application Review (cont'd)

- ▶▶ As part of its review, the Department Sabbatical Leave Committee may invite the applicant to speak for the purpose of clarifying the information within the application.
- ▶▶ The Department Committee makes one of the following recommendations:
  - ▶▶ Grant the leave with or without conditions
  - ▶▶ Defer the leave to a later date
  - ▶▶ Deny the leave

The Committee forwards its recommendation to the Faculty/School Dean and to the Faculty Member. The Dean forwards the Committee's recommendation and her/his own to the University Sabbatical Leave Committee.

# Sabbatical Application Decisions

The University Sabbatical Leave Committee makes the final decision regarding applications based on a review of the following:

- ▶▶ The application;
- ▶▶ The recommendation of the Department Sabbatical Leave Committee;
- ▶▶ The response of the Member, if any, to the recommendation of the Department Sabbatical Leave Committee;
- ▶▶ The recommendation of the Dean and any additional information provided by the Dean;
- ▶▶ The response of the Member, if any, to the recommendation of the Dean;
- ▶▶ The Member's Annual Professional Activity Reports for the preceding three (3) years;
- ▶▶ The applicant's past sabbatical leave performance;
- ▶▶ The Department's sabbatical leave plan;
- ▶▶ The Division, Faculty or School strategic academic and scholarship plan; and
- ▶▶ The budgetary impact on the Division, Faculty or School.

## Sabbatical Application Decisions (cont'd)

- ▶▶ The decision of the Committee “shall be based on the merits and feasibility of the proposed program of scholarly, professional and/or creative activities to be conducted by the Member during the period of sabbatical leave, the value to the Member and the value to the University.”
- ▶▶ The Committee decision will be one of the following:
  - ▶▶ to grant the leave with or without conditions
  - ▶▶ to defer the leave
  - ▶▶ to deny the leave
- ▶▶ No later than January 15th, the applicant is notified in writing of the decision and the Committee’s reasons.

# Deferring a Sabbatical Leave

- ▶ The University Sabbatical Leave Committee may defer a feasible and meritorious leave application for a period of no longer than one year if the *“professional, teaching and/or scholarship needs within the University would be jeopardized or when the University would incur unbudgeted costs as a result of the Member's leave or any other reasonable justification agreed to by the Parties.”*
- ▶ In extenuating circumstances, the Faculty Member may request a deferral of an approved sabbatical leave. *“Such a request shall be made in writing including an explanation of the extenuating circumstances. Such requests shall not be unreasonably denied by the Dean.”*

# Conditions While on Sabbatical Leave

- ▶▶ The assigned duties while on leave are those described in the approved sabbatical leave application
- ▶▶ The Faculty Member may receive external grants/scholarships and may engage in outside professional activities during the leave in accordance with University policy
  - ▶▶ Any enhancement to income during the leave must be approved as part of the Sabbatical Leave application
- ▶▶ Health/Welfare benefits and Pension contributions continue during the leave.
- ▶▶ While on leave, the Faculty Member receives applicable salary adjustments
- ▶▶ Chair stipends are discontinued
- ▶▶ A Faculty Member may apply to have a portion of salary while on sabbatical leave considered a research grant in accordance with Canada Revenue Agency guidelines.

# Conditions On Return from Sabbatical Leave

- ▶▶ The Faculty Member returning from sabbatical leave is required to return to normal duties for a period at least equal to the sabbatical leave period.
  - ▶▶ Failure to fulfill this condition will result in the Faculty Member being indebted to the University for the sum of the salary, benefits and pension contributions paid during the leave.
- ▶▶ No later than 60 days after the end of the sabbatical leave period, the Faculty Member must submit an electronic report detailing the activities and outcomes of the sabbatical leave to the Department Chair, the Dean and the AVP Research.
- ▶▶ For a Member taking a six-month sabbatical leave, the workload during the portion of the academic year when the Member is not on leave shall be one-half of that normally expected of that Member as determined by Article 10.