SABBATICAL LEAVE

PREAMBLE: This section describes the terms of eligibility for sabbatical leave for UI faculty. The policy is derived from, and incorporates all of, the State Board of Education, Governing Policies and Procedures, II-G. 3 b. This section was an original part of the 1979 Handbook and has been changed in only editorial ways since. In 2016 changes were made to clarify process and to ensure that any SLEC member, who submits a sabbatical application while serving on the committee, recuse themselves from all evaluations during said period. Except where explicitly noted, the text is as of July 1996. Further information is available from the current chair of the Sabbatical Leave Evaluation Committee. [ed. 6-09, rev. 7-16]

CONTENTS:
A. General Policy
B. Purpose
C. Period of Leave and Restrictions on Service and Salary
D. Restrictions on Service Application for Sabbatical Leave
E. Criteria and Salaries Rating System Used in Evaluating Applications
F. Annual Leave Schedule for Applying
G. Position Description and Annual Performance Evaluation
H. Changes in or Cancellation of Sabbatical Leave
I. Return
J. Application for Leave
K. Rating System
L. Procedure for Rating
M. Criteria Used in Evaluating Proposals

A. GENERAL POLICY. Members of the UI faculty [see 1520 II-1] with having completed six years of employment at the University of Idaho in a tenure track appointment, tenure at the time of sabbatical leave, and the rank of senior instructor or above, or the equivalent of such rank, leave is to be effective may be granted sabbatical leave after. A faculty member who is untenured, but expects a tenure decision by the time the sabbatical leave is to be taken, may submit an application. Tenured faculty may apply for additional sabbaticals provided that six full academic years have elapsed since the faculty member’s end of the most recent sabbatical and the beginning of the requested sabbatical leave at UI. Sabbatical leave is granted on the basis of application by the faculty member and recommendation by the Sabbatical Leave Evaluation Committee (SLEC) [see 1640.74] and upon approval by the Faculty Senate and the president or designee. Faculty are advised to contact HR to discuss how a sabbatical leave may impact their benefits. In addition, in the event a sabbatical leave will cross over to a new fiscal year, the faculty member is strongly advised to discuss whether, and what impact, the leave may have on salary. Sabbatical leave applications by faculty members in the Cooperative Extension System (CES) are handled processed separately: conditions of leave for these faculty members are established and funding is provided by the CES and their applications are evaluated by a committee of the CES. [ed. 7-01, 7-02, 6-09]

B. PURPOSE. Sabbatical leaves are designed to encourage scientific inquiry, research, artistic creation, clinical/technical expertise and innovation in teaching. The primary purpose of a sabbatical leave is to enhance the faculty member’s value to UI. Specifically, a sabbatical leave is to be used for one or more of the following purposes:
B-1. Research, scholarship, or study intended to result in publication or invention.
B-2. Refresher courses or a program of study, work, or travel designed to keep the faculty member abreast of the latest developments in his or her area of specialization.
B-3. Work toward an advanced degree.
C. PERIOD OF LEAVE AND RESTRICTIONS ON SERVICE AND SALARY. A sabbatical leave is for either one-half academic or fiscal year at full pay or a one full academic or full fiscal year at half pay, depending on the type of appointment held by the faculty member. Faculty on sabbatical continue to be full time employees of the University. Outside employment while on sabbatical must be disclosed per FSH 3260. Note that those on full year sabbaticals must arrange for full year life insurance and disability benefits if so interested. [See APM 55.42] [ed. 1-11]

D. RESTRICTIONS ON SERVICE AND SALARY. The decision as to the acceptability of a proposal will not be based on whether additional remuneration may be received, but rather on the probability that the faculty member will enhance his or her value to UI. Teaching elsewhere or working in research laboratories of industry or government may be approved if such activities can be expected to contribute significantly to the acquisition of useful ideas and practices. In no case shall leave be granted primarily for the purpose of augmenting the person’s income. The benefit to UI must be foremost in the consideration leading to approval of the leave.

H. D. APPLICATION FOR SABBATICAL LEAVE. Complete applications for leave must be submitted to the provost or designee who will collect and forward them to the Sabbatical Leave Evaluation Committee (SLEC). The application must contain:

- Cover Page. A required template for the cover page is included at the end of this policy and must be filled out completely. Include a title indicative of the proposed sabbatical activity, the period of requested leave, name and rank of the applicant, and signatures of the administrators approving the application.

- Abstract. Maximum length: 100 words.

- Description of Proposed Plan for Sabbatical. Major headings should include a detailed statement of what the applicant plans to do while on sabbatical, the objectives and significance of the proposed activities, the value of these activities to the applicant’s UI obligations, the feasibility and methods of accomplishing the objectives, and the applicant’s qualifications pertinent to the proposed activities. This section should consist of not more than four single-spaced typewritten pages. In the case of an application for a sabbatical crossing over the beginning of a new fiscal year, an explanation of the reasons for the timing of the sabbatical should be provided.

- Curriculum Vitae (CV). The applicant’s CV must be on the Include a standard University of Idaho form curriculum vitae.

- Letter of recommendation from the applicant’s college dean or unit administrator.

- Appendix. Evaluation of the proposal by college dean and unit chair, letters of acceptance from persons with whom the applicant plans to work, itinerary, and other supportive documentation should be appended to the application. [ed. 7-98, 7-02, ed. 8-11]

I. CRITERIA AND RATING SYSTEM USED IN EVALUATING APPLICATIONS. The application will be rated by the SLEC. SLEC evaluates applications according to the following criterion and rating system set forth in this policy and makes recommendations to the provost who notifies applicants of the disposition of the application.

K. CRITERIA USED IN EVALUATING PROPOSALS. E-1. Criteria:
Chapter III: EMPLOYMENT INFORMATION CONCERNING FACULTY AND STAFF

Section 3720: Sabbatical Leave

K-1a. Preparation, Thought, and Documentation: Organization of the application, originality of the idea, thoroughness, specificity, feasibility, preliminary work done on the project in addition to the planning, letters of appointment and acceptance, other documents supportive of the proposal, and the applicant's plans for travel, if that is an integral feature of the proposal. [rev. and ren. 7-97]

K-2b. Benefit to UI and to Applicant: Contribution to applicant’s knowledge and understanding, contribution to teaching or other assigned duties at UI, publications or other scholarly works resulting from the project, enhancement of professional status, recognition for UI, and contribution to special projects or to UI programs. [rev. and ren. 7-97]

K-3c. Applicant’s Record of or Potential for Research, Teaching, Service and/or Other Pertinent Activity: Publications, performances, grants, postdoctoral fellowships, leaves, participation in relevant professional organizations, record of achievement on previous grants and leaves, evaluation by unit administrator and dean, and evidence of excellence in teaching, service, or other evidence of contribution to the university. [rev. and ren. 7-97; ed. 7-98, ed. 8-11]

d. Decision: The decision as to the acceptability of an application will not be based on whether additional remuneration may be received by the sabbatical applicant, but rather on the probability that the faculty member will enhance his or her value to UI. Teaching elsewhere or working in research laboratories of industry or government may be approved if such activities can be expected to contribute significantly to the acquisition of useful ideas and practices. In no case will leave be granted primarily for the purpose of augmenting the person’s income. The benefit to UI must be foremost in the consideration leading to approval of the leave.

E-2. RATING SYSTEM: The application will be rated by the SLEC according to the following system:

I-1a. Merit and feasibility of the proposed sabbatical plan, 60 percent. [rev. 7-97]

b. Applicant’s record or potential for research, teaching, service and/or other pertinent activity, 25 percent. [add. 7-97]

c. Length of service to UI in a tenure-track position, up to 15 percent. Each year of service, counting from the faculty member’s initial appointment in a tenure track position or from the faculty member’s most recent sabbatical leave, whichever is later, is assigned a weight of one point, limited to a maximum of 15. [ren. and rev. 7-97]

J. PROCEDURE FOR RATING: To give sufficient time for planning of sabbatical leaves, applications must be submitted at least 10-17 months before the beginning of the academic year during which the leave is to be taken. The SLEC meets in April of each year to consider applications received by March 31 for the academic year beginning 17 months later. The committee rates the applications according to the rating system specified in I and makes recommendations to the Provost who notifies applicants of the university’s preliminary approval or disapproval. In this round of sabbatical applications, the provost notifies no more applicants than a number equal to 60 percent of the sabbatical leaves expected to be available for the year under consideration. Faculty members who do not apply for sabbatical leave by March 31 may apply on or before November 1 for the academic year beginning 10 months later. The SLEC meets in November to consider new applications (and reconsider resubmitted applications). The SLEC again makes recommendations to the provost who submits a list of those faculty members recommended by the SLEC and proposed by the provost in both April and November to Faculty Senate for final approval. If there is substantial change in an applicant’s plans, he or she must submit a new plan through the unit administrator, dean, and the SLEC for approval. If the new plan is not approved, the applicant may request leave without pay. [rev. 7-97, ed. 7-09, ed. 8-11]

F. SCHEDULE FOR APPLYING: Each year there are two rounds of application consideration:
UI FACULTY-STAFF HANDBOOK
Chapter III: EMPLOYMENT INFORMATION CONCERNING FACULTY AND STAFF
Section 3720: Sabbatical Leave

F-1. Round 1. Deadline March 31\textsuperscript{st}. This deadline applies to:

a. Faculty with an academic year appointment planning to begin a full year sabbatical at the start of the second fall semester after submitting the application;
b. Faculty with an academic year appointment planning to begin a one semester sabbatical at the start of the second fall semester or the second spring semester after submitting the application;
c. Faculty with a fiscal year appointment planning to begin a full year sabbatical at the start of the second fiscal year after submitting the application;
d. Faculty with a fiscal year appointment planning to begin a half year sabbatical during the second fiscal year after submitting the application.

F-2. Round 2. Deadline October 31\textsuperscript{st}. This deadline applies to faculty who missed the Round 1 deadline:

a. Faculty with an academic year appointment planning to begin a full year sabbatical at the start of the next fall semester;
b. Faculty with an academic year appointment planning to begin a one semester sabbatical at the start of the next fall semester or the second spring semester after submitting the application;
c. Faculty with a fiscal year appointment planning to begin a full year sabbatical at the start of the next fiscal year after submitting the application;
d. Faculty with a fiscal year appointment planning to begin a half year sabbatical during the next fiscal year after submitting the application.

GE. POSITION ANNUAL JOB DESCRIPTION AND ANNUAL PERFORMANCE EVALUATION. The faculty members on sabbatical remain full time employees of UI. Faculty members are expected to include their sabbatical purpose and goals on their annual faculty job position description. Their annual performance evaluation must reflect whether the purpose and goals of the sabbatical were achieved.

F-H. CHANGES IN OR CANCELLATION OF SABBATICAL. If a faculty member must change the purpose, place, or time of the sabbatical leave, or needs to cancel their leave, the faculty member must submit a revised cover sheet indicating the type of change along with an updated written request, with recommendation from the dean and unit administrator, to the SLEC for approval. The SLEC will review the change and make a recommendation to the provost for final approval. This request must state the rationale for the changes and document how the sabbatical leave plan will reflect these changes. Upon approval by the SLEC, any changes will be sent to the provost. [ed. 8-11]

IG. RETURN. The faculty members are expected either to return to the active service of UI for at least one academic year after completion of the leave or to repay the money received from UI while on leave, unless the president approves a waiver of this requirement. Results of the sabbatical should be detailed on the annual performance evaluation and will serve as the official record of return and accomplishment. Within six weeks after returning, the faculty member must submit to the provost’s office and to the faculty member’s dean and unit administrator, a complete report in PDF format of his or her activities while on leave. This report will be available to the faculty member’s dean and unit administrator. [rev. 7-97, 7-02, 7-13, 7-16, ed. 8-11]
**SABBATICAL LEAVE EVALUATION FORM** [rev. 7-97]

**APPLICANT’S NAME**

**SEMESTER(S) APPLIED FOR**

**PURPOSE OF LEAVE**

**I--VALUE OF PLAN (Maximum 60 points)**

A. Preparation, Thought, and Documentation (where appropriate) (30 points)

(For preparation and thought, consider the following: organization of the proposal application, originality of the idea, thoroughness, specificity, feasibility, and preliminary work begun on project beyond planning; for documentation consider the following: itinerary, letters of appointment, letters of acceptance, and other supportive documentation if applicable.)

<table>
<thead>
<tr>
<th>Quality</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent</td>
<td>27-30; Good 22-26; Average 16-21; Poor 8-15; Unacceptable 0-7</td>
</tr>
</tbody>
</table>

B. Benefit to University and Individual (30 points)

(Consider the following: contribution to applicant’s knowledge and understanding, contribution to teaching or other assigned duties at university, publications or other scholarly works resulting from project, enhancement of professional status, recognition for university, contribution to special projects or programs within university.)

<table>
<thead>
<tr>
<th>Quality</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent</td>
<td>27-30; Good 22-26; Average 16-21; Poor 8-15; Unacceptable 0-7</td>
</tr>
</tbody>
</table>

**II. APPLICANT’S RECORD OR POTENTIAL FOR RESEARCH, TEACHING, SERVICE AND/OR OTHER PERTINENT ACTIVITY (Maximum 25 points)**

(Consider the following: publications, performances, grants, post-doctoral fellowships, leaves, participation in relevant organizations, record of achievement of previous grants and leaves, evaluation by unit administrator and dean, including their assessment of the proposed sabbatical plan proposal and annual evaluation forms, evidence of excellence in teaching, service, or other evidence of contributions to the university, as required by the applicant’s position description.) [ed. 8-11]

<table>
<thead>
<tr>
<th>Quality</th>
<th>Points</th>
</tr>
</thead>
<tbody>
<tr>
<td>Excellent</td>
<td>23-25; Good 19-22; Average 13-18; Poor 8-12; Unacceptable 0-7</td>
</tr>
</tbody>
</table>

**III--SERVICE (Maximum 15 points)**

(One point awarded for each year of service to university since the last sabbatical leave to a maximum of 15 points.)

<table>
<thead>
<tr>
<th>Points</th>
</tr>
</thead>
</table>

**EVALUATOR**

**DATE**

**Total Points**