

Appendix C: University of Massachusetts Sabbatical Leave Policy

1. The purpose of the sabbatical leave is to provide uninterrupted opportunity at regular intervals for tenured faculty members for teaching improvement, writing, research, professional improvement, scholarly pursuits, or to gain new information and experience in order to remain current in one's field.
2. All tenured faculty members who have given the University at least six years of service (including all approved paid leaves) at the rank of Instructor, Assistant Professor, Associate Professor, or Professor shall be considered eligible for sabbatical leave and may apply. The first sabbatical may be taken after receiving tenure or after 6 years of full-time-equivalent service, whichever is later, but the initial application may be delayed at the faculty member's discretion. Sabbatical leaves will be awarded after thorough review and evaluation of the merits of the individual leave proposal. The Academic Personnel Policy of the University of Massachusetts (T76-081, the "Redbook") describes the general criteria for the award of sabbatical leaves, subject to the availability of funds and a request by the faculty member, as follows:
 - 2.1 A record of achievement, service, and contribution during the years of service prior to the leave period that provides reasonable expectation that the objectives of the sabbatical project will be achieved.
 - 2.2 A sabbatical leave project which promises to contribute to the development of the faculty member in areas of teaching; of research, creative or scholarly activity; and/or of professional service capability, and hence contribute to the institution as a whole upon the return to the University for at least one year following the academic year in which the sabbatical leave takes place.
3. Full-time tenured faculty previously on part-time appointments will be given equivalent credit for part-time service (e.g., eight years at $\frac{1}{2}$ time and two years at full time = six years) and will be eligible for sabbatical leave based on current full-time salary. Part-time tenured faculty will be eligible for sabbatical leave based on part-time salary.
4. Sabbatical leaves can be taken in three ways:
 - 4.1 Single semester (five-and-a-half months for those on calendar year appointments) at a pay rate determined by the accrued sabbatical credits, up to a maximum of 100%
 - 4.2 Full year (eleven months for those on calendar year appointments) at a pay rate determined by the accrued sabbatical credits, up to a maximum of 100%
 - 4.3 Two non-consecutive semesters at a pay rate determined by the accrued sabbatical credits, up to a maximum of 100%.
5. Sabbatical compensation
 - 5.1 Tenured faculty members will be eligible for sabbatical leave at a salary percentage based on their accrued semesters of full-time equivalent service. This percentage will be determined by multiplying by 4.167% the number of semesters of qualified service. Qualified service includes all semesters of full-time equivalent service that have not been used for any prior sabbatical leave. Qualified service excludes any academic year during which a sabbatical leave is taken, except that for a faculty member who takes the option of two non-consecutive semesters, or a faculty member who takes the option of a spring-fall sabbatical leave, qualified service excludes only those two semesters. No sabbatical leave of any length may be compensated at more than 100% of salary.

Sabbatical leaves may, at the request of the faculty member, be compensated at a percentage of salary determined by semesters of full-time equivalent service accrued, up to 100%. Faculty members may determine the number of sabbatical credits they devote to any sabbatical leave. (Faculty members should be aware that any sabbatical leave taken at less than 50% pay will suspend payment of benefits during that sabbatical leave.) Any unused sabbatical credit shall be carried forward and available for use toward the next sabbatical leave, up to a maximum of 100%.

- 5.2** Year-by-year eligibility for sabbatical leave is displayed on the attached chart. Sabbaticals may generally not be taken more often than once in any three-year period; exceptions to this provision may be granted with the approval of the Department Chair/Head, Dean, and Provost. A two-semester non-consecutive sabbatical is considered a single sabbatical leave and does not require the granting of an exception.
- 5.3** Non-consecutive semester sabbatical leaves shall be compensated at the same rate as full-year sabbatical leaves. Faculty members shall not accrue sabbatical credit for any semester of a non-consecutive sabbatical leave. Faculty members shall accrue sabbatical credit for semesters of full-time equivalent service during the non-sabbatical semesters of an academic year during which a non-consecutive sabbatical leave is taken. Non-consecutive sabbaticals shall be awarded using the same standards as consecutive sabbaticals.
6. Faculty members who are on full salary sabbatical leave may not engage in salaried employment in this country or elsewhere, however desirable the experience, except as provided for in the “Policy on Faculty Consulting and Outside Activities” (Trustee Policy T96-047).¹ This does not preclude acceptance of scholarships, fellowships, or grants for the purpose of research and study for which no services are required, or Fulbright lectureships when teaching is combined with research. A faculty member on a partial-salary sabbatical leave may, with the prior approval of the Dean and Provost, accept outside remuneration for work directly relevant to his or her teaching, research, creative or professional activity, or service.
7. Recipients of a sabbatical leave must return to duty for at least one year of service immediately following the expiration of the leave. Postponement of the required return may be approved by the Chancellor, with the concurrence of the President, when there are sound reasons for doing so and when the faculty member has acknowledged in writing that his or her obligation to return for a full year of service remains in effect; all such postponements will be reported to the Board of Trustees. Failure to return will obligate the member to refund the salary received during the sabbatical leave, unless an exception is made by the Board of Trustees. This obligation to return or refund the sabbatical salary shall be waived in the case of a sabbatical recipient who dies before the return is completed.
8. Each recipient shall, upon return, file copies of a report of activities and their results with President, Provost, Dean and Department Chair/Head.

¹ <http://media.umassp.edu/massedu/policy/Fac%20Consulting%20Policy%20-%20UMA-UMB.pdf>

9. At the time of implementation of this new sabbatical leave policy on September 1, 2010, full-time tenured faculty members with at least six years of service will be credited with sabbatical percentage based on their years of service since the date of appointment to the regular faculty or since the last sabbatical, whichever is later, up to a maximum of 50% of salary (making them immediately eligible for a one-semester sabbatical leave at 100% of salary or a full academic year of sabbatical leave at 50% of salary). A faculty member who has had more than six years of service since the last sabbatical leave may apply for additional sabbatical leave credits. Representatives of the Union and Administration shall discuss and resolve any such applications that are denied.

<u>Sabbatical Salary Compensation Chart</u>				
semesters of credit	% of semester salary	single semester benefit eligibility	% of full year salary	full year benefit eligibility
1	8.3	not eligible	4.2	not eligible
2	16.7	not eligible	8.3	not eligible
3	25.0	not eligible	12.5	not eligible
4	33.3	not eligible	16.7	not eligible
5	41.7	not eligible	20.8	not eligible
6	50.0	full benefits	25.0	loss of benefits
7	58.3	full benefits	29.2	loss of benefits
8	66.7	full benefits	33.3	loss of benefits
9	75.0	full benefits	37.5	loss of benefits
10	83.3	full benefits	41.7	loss of benefits
11	91.7	full benefits	45.8	loss of benefits
12	100.0	full benefits	50.0	full benefits
13			54.2	full benefits
14			58.3	full benefits
15			62.5	full benefits
16			66.7	full benefits
17			70.8	full benefits
18			75.0	full benefits
19			79.2	full benefits
20			83.3	full benefits
21			87.5	full benefits
22			91.7	full benefits
23			95.8	full benefits
24			100.0	full benefits