

The policy statement which follows is excerpted from the July 2009 agreement between the Board of Trustees of the University of Massachusetts and the Massachusetts Society of Professors, Faculty Staff Union/MTA/NEA. The contract amends Trustee Document T86-076 and explicated by Section 4.13 of the Academic Personnel Policy (Doc. T76-081 approved 6/2/76), concerning Sabbatical Leaves for members of the faculty and (bargaining unit) librarians at the University of Massachusetts. A copy of the original Trustee Document is available in the offices of the president of the university, the provosts of the campuses, Human Resources, and the academic deans, or at <http://www.massachusetts.edu/policy/personnelpolicies.html>.

SABBATICAL LEAVE POLICY

T86-076

12/15/86

In addition to the provisions of the Sabbatical Leave Policy, as set forth by the Trustees, the general criteria for the award of sabbatical leaves, subject to the availability of funds and a request by the faculty member, are the following:

- a) 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.
 - b) A sabbatical leave project which promises to contribute to the development of the faculty member in areas of teaching; research; creative or scholarly activity; and/or 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.
1. The purpose of the sabbatical leave is to provide uninterrupted opportunity at regular intervals for 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 shall be considered eligible for sabbatical leave and may apply. Sabbatical leaves will be awarded after thorough review and evaluation of the merits of the individual leave proposal.
 3. Full-time tenured faculty previously on part-time appointments will be given equivalent credit for part-time service (e.g., eight years at *Y* 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. After six years of full-time service, tenured faculty members will be eligible for a one semester sabbatical leave at 100% of salary or a full academic year of sabbatical leave at 50% of

salary. Tenured faculty members will be eligible for subsequent sabbatical leave at a salary percentage based on their years of service. This percentage will be determined by multiplying by 7.14% the number of years (including the proposed sabbatical year) of full-time service since the date of appointment to the regular faculty or since the last sabbatical, whichever is later. The sabbatical leave may be taken for a full academic year (eleven months for those on calendar year appointments) at the resulting percentage or for a semester (five-and-a-half months for those on calendar year appointments) at twice the resulting percentage, up to 100%. Year-by-year eligibility for sabbatical leave is displayed on the attached chart. Sabbaticals may not be taken more often than once in any three-year period.

5. 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). 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.

6. 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.

7. Each recipient shall, upon return, file copies of a report of activities and their results with President, Provost, Dean and Department Head.

8. 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.