

California State University, Long Beach

POLICY STATEMENT

November 4, 1983

Number: 77-17  
(Revised)

File: Leave

SUBJECT: SABBATICAL LEAVE POLICIES, PROCEDURES, AND CRITERIA

This policy statement, recommended by the Academic Senate at its meeting of April 14, 1977, and approved by the President on April 25, 1977, and modified in conformance with the Unit 3 Memorandum of Understanding in August 1983, is as follows:

I. TYLX/VL//Bdara/ot/TYVSESS//and/QSVQ/SSYXEWZde/POLIXLES  
General Provisions

- A. Sabbatical leave may be granted after six consecutive academic years of full-time service for the purpose of professional development and/or research and/or to pursue a degree or other educational program. The leave shall be granted on a non-renewable basis for a period of one (1) semester at full salary or two (2) semesters at one-half (1/2) of full salary. The leave shall be granted on a non-renewable basis for a period of one (1) semester at full salary or two (2) semesters at one-half (1/2) of full salary. The leave shall be granted on a non-renewable basis for a period of one (1) semester at full salary or two (2) semesters at one-half (1/2) of full salary.

A full-time tenured faculty/library employee shall be eligible for a sabbatical leave if he/she has served full-time in a probationary and/or tenured position(s) for six (6) years in the preceding seven (7) year period prior to the leave and at least six (6) years after any previous sabbatical leave or difference in pay leave.

Such sabbatical leaves are classified as:

1. Regular (Class A) - Half-year/whole-year/full-year/leave for full-year/leave whole-year/half-year/leave

The salary of a faculty/library employee on a sabbatical leave shall be in accordance with the following:

- a. one (1) semester at full salary;  
b. two (2) semesters at one-half (1/2) of full salary.





due to the applicant during his leave of absence/////

F. Each school faculty shall adopt a sabbatical leave document which will outline the procedures for the election of the school Sabbatical Leave (Professional Leave) Committee and the criteria for the sabbatical process.

FE. Normally, a faculty member/librarian on sabbatical leave (Class A and Class B) shall not accept employment elsewhere (although he/she may go on a Fulbright or similar fellowship or accept payment of travel expenses connected with a sabbatical program). There may be a rare instance where employment would contribute to the goal of the individual's sabbatical leave. However, the intention to do so must be clearly stated in the sabbatical leave plan submitted and must be approved in advance. The burden of proof shall be approved in advance. The burden of proof shall be on the individual in any such exceptional circumstance to demonstrate the worth of such employment. Such employment shall be minimal and purely incidental and subject to the prior approval of the President's designee.

F. A faculty member/librarian on sabbatical leave shall not accept additional and/or employment without prior approval of the President's designee.

G. A faculty member/librarian on sabbatical leave shall be entitled to accrue sick leave, vacation, and service credit toward merit salary adjustment eligibility, eligibility toward promotion, if applicable, and seniority credit.

H. A faculty member/librarian granted a sabbatical leave may be required by the President's designee to provide verification that the conditions of the leave were met. The statement of verification shall be provided to the President's designee and the Professional Leave Committee.

I. A faculty member/librarian shall render service to the CSU upon return from a sabbatical leave at the rate of one (1) term of service for each term of leave.

J. Each faculty member/librarian on sabbatical shall be entitled to exercise all her/his normal faculty privileges.

## II. University Procedures

A. Each school faculty shall adopt a sabbatical leave document which will outline the procedures for the election of the school Sabbatical Leave (Professional Leave) Committee and the criteria for the sabbatical process.

- B. The applicant's request shall be forwarded through the Department ~~Chairperson~~ to the School Sabbatical Leave (Professional Leave) Committee no later than November 18 for a sabbatical leave in the following academic year. A copy of the application shall be sent to the faculty member's department. The department shall provide a statement to the Dean regarding the possible effect on the curriculum and the operation of the department should the faculty member be granted a sabbatical. The School Sabbatical Leave (Professional Leave) Committee shall forward its recommendations to the Dean of the School by December 15.
- C. A Sabbatical Leave (Professional Leave) Committee composed of tenured faculty/ librarian employees shall review sabbatical applications. The sabbatical leaves committee shall be elected by probationary and tenured faculty/librarian employees. A faculty/librarian employee applying for a sabbatical leave shall not be eligible for election to the Professional Leave Committee. The recommendation ensuing from such a review shall be submitted to the Dean/Director. These reviews shall consider questions related to the quality of the proposed sabbatical project.
- D. The School Sabbatical Leave (Professional Leave) Committee on the basis of the material submitted shall evaluate the applications/ and ~~forward~~ ~~to the Dean~~ ~~make recommendations to the School Dean~~ ~~who shall review the Committee's recommendations and forward his/her recommendation to the President's designee.~~ Prior to making a recommendation to the President's designee (the Associate Vice President for Academic Personnel) regarding the sabbatical leave application, the Dean/Director shall consider the recommendations pursuant to the above provisions, other campus program needs and campus budget implications. ~~It is the policy of the School that the Dean/Director shall forward the recommendations of the Sabbatical Leave Committee to the President's designee for his/her consideration.~~
- E. Recommendations and accompanying proposals shall be filed with the Associate Vice President for Academic ~~Personnel~~ no later than December 23.
- F. Prior to making a final determination regarding the sabbatical leave and the conditions of such an approved leave, the President's designee shall consider the recommendations made pursuant to the above provisions. The President's designee shall respond in writing to the applicant and such a response shall include the reasons for approval or denial. If a sabbatical leave is granted, the response shall include any conditions of such a leave. A copy of this response shall be provided to the affected department and the Professional Leave Committee.



PG. Each faculty member/librarian granted a sabbatical leave shall, upon return to service, submit a written report of study to the Department Chairperson, Dean/Director of the School, and Associate Vice President for Academic Affairs the President's designee for inclusion in her/his personnel file. In addition, faculty granted Class A sabbaticals should be prepared to present the results of the sabbatical leave program in a Departmental and/or School seminar.

H. School Sabbatical Leave (Professional Leave) policies and procedures are subject to review and approval of the Associate Vice President for Academic Personnel, in consultation with the University Personnel Policies and Practices Committee. University Personnel Policies and Practices Committee shall review and approve all sabbatical leave requests. The University Personnel Policies and Practices Committee shall also review and approve all sabbatical leave requests.

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J. University Personnel Policies and Practices Committee shall review and approve all sabbatical leave requests. The University Personnel Policies and Practices Committee shall also review and approve all sabbatical leave requests.

### III. Criteria

- A. The minimum requirements which must be met for sabbatical leave to be authorized are set forth in Section I above. Faculty must apply according to the procedures set forth in Section II above, and must file a detailed plan of study, research, travel or service. The application must state how the carrying out of this plan by the faculty member will be of benefit to the CSU University.
- B. If for any reason, an individual is denied a Class A sabbatical, he/she will automatically be considered for a Class B sabbatical. While it is the policy of the University to grant type "B" difference-in-pay leaves to all faculty who meet the minimum criteria if it is fiscally possible to do so, the scarcity of type "A" leaves requires that applications for such leave be evaluated comparatively. In making such evaluations, committees and administrators involved shall consider the following:
  1. The relative value of the completion of the proposal to the University. This assessment may consider the needs of the program/department to which the faculty member is assigned (or may be assigned). The following are considered of value to the University:

- a. Improved instructional effectiveness (for example, intellectual and professional growth of the applicant, exploration of training in new instructional modes and methodologies, . . .) with the exclusion of study toward completion of any degree including the terminal degree.
  - b. Scholarly and creative contributions to the field (for example, publications, exhibits, performances, etc.).
  - c. Retraining to assume new duties or assignments in an instructional field or discipline.
  - d. Research activities or projects which directly contribute to institutional effectiveness or to University/community interrelationships.
2. The relative likelihood that the proposal will be completed as planned, and will result in definite accomplishments as stated in the plan. The program should therefore be clearly stated (purposes, methodology, specific work to be undertaken, expected outcomes). Evidences in the form of the proposer's training, background or past achievements, or in the form of work on the project already begun should be cited.
  3. The necessity of a sabbatical leave for the completion of the proposal.
  4. When there is equal merit among candidates, the number of years of full-time employment in The California State University ~~and/or~~ system since the last leave, or since employment if no previous sabbatical leave is on record.

Effective: 9/1/77

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Academic Senate Office



CALIFORNIA STATE UNIVERSITY, LONG BEACH

POLICY STATEMENT

NUMBER: 77-17

FILE: Leave

*See Revised PS 77-17  
of 11/4/83*

SUBJECT: Sabbatical Leave Policies, Procedures, and Criteria

The following policy statement, recommended by the Academic Senate at its meeting of April 14, 1977, and approved by the President on April 25, 1977, is as follows:

I. Title VI, Board of Trustees, and CSUC Systemwide Policies

- A. Sabbatical leaves may be granted after six consecutive academic years of full-time service "for the purpose of permitting study or travel by the employee which will benefit the California State University and Colleges" (Title VI, Section 43000). When a faculty member has served as a full-time lecturer preceding an appointment in a tenure-track position, the years as a lecturer which were counted toward tenure (maximum of two years) shall also be counted as full-time teaching toward eligibility for sabbatical leave. Current funding limits sabbatical leaves to full-time "teaching" faculty (FSA 66-25).

Such sabbatical leaves are classified as:

1. Regular (Class A) - half year with full pay or full year with half pay.
  2. Differential (Class B) - either one semester or one year "with compensation equal to the difference in salary between that received by the person on leave and minimum salary of the instructor rank" (Title VI, Section 43000).
- B. Sabbatical leaves, which may not exceed one year, are granted by the School Deans/Directors under authority delegated from the Chancellor and the President (FSA 67-19). The number of leaves granted in any one semester or year shall not be so great in any Department, School, or at the campus as a whole as to disrupt the continued and regular course offerings or to affect the quality level of education offered to the students. The granting of leaves shall not exceed existing appropriations for such leaves (Title VI, Sections 43000, 43003).

- C. An applicant for a sabbatical leave shall forward a request, with the appropriate information of "the applicant's plan of study, research, or travel and service together with a statement of the benefits which would accrue to the campus and students thereof from the proposed study or the proposed travel and service" (Title VI, Section 43004a).
- D. Each faculty member granted a sabbatical leave will be required to sign a written statement agreeing to carry out the proposal to the best of his/her ability and an agreement to "return to the service of the CSUC and render the requisite service therein following his return from leave of absence. Such agreement shall be accompanied by a statement of assets showing, to the satisfaction of the (President or designee) the employee's capacity to indemnify the State of California against loss in the event that he fails, through fault of his own, to fulfill the agreement." If it is determined that a faculty member's assets are insufficient he/she will be required to furnish a bond "in the amount of the total salary computed to become due to the applicant during his leave of absence..." (Title VI, Section 43005). Retirement funds, when they are sufficient, shall serve as assets to indemnify the State.
- E. Each sabbatical leave must be followed by a term of service to the University for each term of leave (Title VI, Section 43005).
- F. Normally, a faculty member on sabbatical leave (Class A and Class B) shall not accept employment elsewhere (although he/she may go on a Fulbright or similar fellowship or accept payment of travel expenses connected with a sabbatical program). There may be a rare instance where up to half-time employment would contribute to the goal of the individual's sabbatical leave. However, the intention to do so must be clearly stated in the sabbatical leave plan submitted and must be approved in advance. The burden of proof shall be on the individual in any such exceptional circumstance to demonstrate the worth of such employment. Such employment shall be minimal and purely incidental and subject to the prior approval of the Associate Vice President for Academic Affairs--Academic Personnel (FSA 64-59).

## II. University Procedures

- A. Each school faculty shall adopt a sabbatical leave document which will outline the procedures for the election of the school sabbatical leave committee and the criteria for the sabbatical process. School sabbatical leave policies and procedures are subject to review and approval of the Associate Vice President for Academic Affairs--Academic Personnel, in consultation with the University Personnel



Policies and Practices Committee, with regard to their consistency with established policies of the CSUC System and of the University and with acceptable professional standards.

- B. The applicant's request shall be forwarded through the Department Chairperson to the School Sabbatical Leave Committee no later than November 1 for a sabbatical leave in the following academic year. The School Sabbatical Leave Committee shall forward its recommendations to the Dean of the School by December 1.
- C. The School Sabbatical Leave Committee on the basis of the material submitted shall evaluate the applications, and following consultation with the School Dean, make recommendations to the School Dean, who shall review the Committee's recommendations. If the Dean differs with the Committee, the Dean's decision, with reasons stated in writing to the applicant, shall be final. Copies of final decision and accompanying proposals shall be filed with the Associate Vice President for Academic Affairs no later than December 15.
- D. Each faculty member granted a sabbatical leave shall, upon return to service, submit a written report of study to the Department Chairperson, Dean of the School, and Associate Vice President for Academic Affairs--Academic Personnel for inclusion in her/his personnel file. In addition, faculty granted Class A sabbaticals should be prepared to present the results of the sabbatical leave program in a Departmental and/or School seminar.
- E. Each faculty member on sabbatical shall be entitled to exercise all her/his normal faculty privileges.
- F. All persons and parties are strongly urged to make good faith efforts to resolve informally any disputes which arise relative to sabbatical leave matters. However, if a satisfactory adjustment does not result, the person(s) concerned may seek relief pursuant to CSUC System grievance procedures.

### III. Criteria

- A. The minimum requirements which must be met for sabbatical leave to be authorized are set forth in Section I above. Faculty must apply according to the procedures set forth in Section II above, and must file a detailed plan of study, research, travel or service. The application must state how the carrying out of this plan by the faculty member will be of benefit to the University.

- B. If for any reason, an individual is denied a Class A sabbatical, he/she will automatically be considered for a Class B sabbatical. While it is the policy of the University to grant type "B" leaves to all faculty who meet the minimum criteria if it is fiscally possible to do so, the scarcity of type "A" leaves requires that applications for such leave be evaluated comparatively. In making such evaluations, committees and administrators involved shall consider the following:
1. The relative value of the completion of the proposal to the University. This assessment may consider the needs of the program/department to which the faculty member is assigned (or may be assigned). The following are considered of value to the University:
    - a. Improved instructional effectiveness (for example, intellectual and professional growth of the applicant, exploration of training in new instructional modes and methodologies,...) with the exclusion of study toward completion of any degree including the terminal degree.
    - b. Scholarly and creative contributions to the field (for example, publications, exhibits, performances, etc.).
    - c. Retraining to assume new duties or assignments in an instructional field or discipline.
    - d. Research activities or projects which directly contribute to institutional effectiveness or to University/community interrelationships.
  2. The relative likelihood that the proposal will be completed as planned, and will result in definite accomplishments as stated in the plan. The program should therefore be clearly stated (purposes, methodology, specific work to be undertaken, expected outcomes). Evidences in the form of the proposer's training, background or past achievements, or in the form of work on the project already begun should be cited.
  3. The necessity of a sabbatical leave for the completion of the proposal.
  4. When there is equal merit among candidates, the number of years of full-time employment in The California State University and Colleges System since the last leave, or since employment if no previous sabbatical leave is on record.

Effective: 9/1/77

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4/28/77