

# Application and Contract for Sabbatical Leave Portland State University

I, \_\_\_\_\_, ID Number: \_\_\_\_\_, hereby apply for sabbatical leave from \_\_\_\_\_ to \_\_\_\_\_.

The purpose of my sabbatical leave is attached to this form along with a copy of a current vita. Indicate the number of pages of attachments incorporated into this contract by reference: \_\_\_\_\_

My yearly salary basis during this period of leave is \_\_\_\_\_ % salary in accordance with the Administrative Rules of the State Board of Higher Education governing such leaves.

My salary rate for the fiscal year is \$ \_\_\_\_\_ on the basis of \_\_\_\_\_ months of service for full time equivalency.

I have been a member of the faculty at Portland State University for \_\_\_\_\_ years, holding academic ranks with full-time service as follows for the years indicated (Omit years on part-time service. For leaves based on other than full time service attach exhibit, showing computation of eligibility and salary):

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

My previous sabbatical leaves have been as follows: (if none check here \_\_\_\_\_)

From \_\_\_\_\_, 19\_\_\_\_, to \_\_\_\_\_, 19\_\_\_\_; From \_\_\_\_\_, 19\_\_\_\_, to \_\_\_\_\_, 19\_\_\_\_  
 From \_\_\_\_\_, 19\_\_\_\_, to \_\_\_\_\_, 19\_\_\_\_; From \_\_\_\_\_, 19\_\_\_\_, to \_\_\_\_\_, 19\_\_\_\_

Eligibility, services, and salary data verified for institution by: _____ <span style="float: right;"><i>(signature)</i></span> Name and Title: _____
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This Application and Contract are subject to the Board of Higher Education's Administrative Rules governing sabbatical leaves in effect as of the date of this Agreement, a copy of which is on the reverse side and made a part of this Application and Contract. Having read and understood these rules, I agree to comply with them.

I agree to remain in the service of the Oregon Department of Higher Education and Portland State University for one year, or the full-time equivalent thereof, after the expiration of the Sabbatical Leave, if granted. Should I terminate my employment before I fulfill this obligation for any reason except for death or permanent disability caused by ill health or accident, I agree to refund within three months of my termination the amounts of compensation I received during the Sabbatical Leave. Compensation shall include gross salary, employer contributions to benefits including, but not limited to, medical and retirement benefits.

Approved:

1) Department Chair	Date	Signature of Applicant
2) Dean or Director	Date	Present Rank or Title
3) Provost or Vice President	Date	Department
4) President	Date	OAA/HRC

Fully signed copies of this application will be distributed to each area by OAA/HRC.

**Amendments to this contract:** When signed by all parties, this document becomes a contract. Cancellation of the leave, change in dates, purpose, or any other conditions must be approved by all signatories to this Agreement. Cancellations should be made by letter. Other changes may be made on copies, initialed by all signatories or a substitute agreement marked "REVISED" may be substituted.

# ADMINISTRATIVE RULES ON SABBATICAL LEAVE

## Oregon State Board of Higher Education

**Purposes of Sabbatical Leave 580-021-0200** Sabbatical leave is granted to unclassified employees having academic rank for purposes of research, writing, advanced study, travel undertaken for observation and study of conditions in our own or in other countries affecting the applicants field or related scholarly or professional activities. Sabbatical leave is a privilege and not a right. It is granted only when it can be shown that the applicant is capable of using this period in a manner that will thereafter increase the applicant's effectiveness to the institution and to the state.

Stat. Auth.: ORS 351.070. Hist.: HEB 3-1978, f. & ef. 6-5-78; HEB 8-1989, f. 12-11-89, cert. ef. 1-1-90; section (2) Renumbered to 581-021-0245; HEB 1-1993, f. & cert. ef. 2-5-93

### **Eligibility for Sabbatical Leave 580-021-0205**

(1) An unclassified employee appointed at .5 FTE or more, with the rank of Senior Instructor, Assistant Professor, Associate Professor, Professor, Research Associate or Senior Research Associate may be considered for sabbatical leave: (a) After having been continuously appointed without interruption by a sabbatical leave for 18 academic quarters (excluding Summer Session) or, in the case of 12-month faculty, 72 months; or (b) After having accumulated the equivalent of 6.0 FTE years over an indefinite period of 9-month or 12-month appointments uninterrupted by a sabbatical leave. (c) Prior service at the ranks of Instructor, Lecturer or Research Assistant, when leading to a promotion to a higher rank, may be considered by an institution president as part of the period of accumulated service for the purposes of the time requirement for sabbatical eligibility.

(2) A series of appointments shall be considered continuous whether or not interrupted by one or more authorized leaves of absence other than a sabbatical leave. A one-year period of appointment at less than .5 FTE will count as a period of accumulated service for purposes of the time requirement for sabbatical eligibility. An authorized leave of absence will not prejudice the staff member's eligibility for sabbatical leave. Academic staff members may be considered for subsequent sabbatical leaves after again satisfying the conditions specified in subsections (1)(a) or (b) of this rule. Cases involving mixed terms of service may be adjusted by the institutional president or the president's designee, in accordance with the principles set forth in this rule.

(3) For institutional convenience, and at the initiative and sole discretion of the institution, a sabbatical leave may be delayed by up to two years. In such instances, the academic staff member will become eligible for a succeeding sabbatical leave after an equivalently reduced period of years. This section applies to a maximum of 14 consecutive years, covering two possible sabbatical leaves. The same agreement may be negotiated, again for institutional convenience, in subsequent 14-year periods.

(4) Sabbatical leave privileges may be granted to unclassified employees in special positions of responsibility and trust, even though they do not hold academic rank. Eligibility for this class of employees will be determined in the manner described in section (1) of this rule. Recommendations for sabbatical leave for the above-referenced unclassified staff members not otherwise qualified may be made in exceptional cases only at the discretion of institution presidents.

(5) For purposes of determining eligibility for sabbatical leave, time spent on an authorized military leave from a Department institution shall be considered as institutional service.

(6) Salary received by an academic staff member during a sabbatical shall be calculated as follows:

(a) Salary under subsection (1)(a) of this rule shall be a percentage (determined by OAR 580-021-0225 or 580-021-0230) of the academic staff member's annual rate multiplied by the average FTE at which the academic staff member was appointed during the 6.0 FTE years immediately prior to the sabbatical leave. Presidents shall have the authority and discretion to interpret special circumstances in this regard. For purposes of this subsection, eligibility years are the 18 academic quarters (excluding Summer Session) or in the case of 12-month faculty, 72 months of continuous employment at half-time or more that result in the academic staff member's eligibility for sabbatical leave under subsection (1)(a) of this rule.

(b) Salary under subsection (1)(b) of this rule shall be a percentage (determined by OAR 580-021-0225 or 580-021-0230) of the academic staff member's annual rate in effect at the time the sabbatical leave begins.

(c) If during the period of sabbatical leave the institution allocates salary increases to its academic staff members, the annual rate of the academic staff member on sabbatical leave will be increased by the appropriate amount effective on the date that the salary increase was granted.

Stat. Auth.: ORS 351.070. Stats. Implemented: ORS 351.070 Hist.: HEB 3-1978, f. & ef. 6-5-78; HEB 4-1987, f. 4-22-87, ef. 7-1-87; HEB 8-1989, f. 12-11-89, cert. ef. 1-1-90; HEB 1-1993, f. & cert. ef. 2-5-93; HEB 5-1996, f. & cert. ef. 12-18-96

### **Approval and Revisions of Sabbatical Leave Agreements 580-021-0210**

(1) Sabbatical leave shall be granted only if approved by the president or designee. (2) Revision of the sabbatical leave program or other terms and conditions of the agreement

shall be approved by all parties to the original agreement.

Stat. Auth.: ORS 351.070 Hist.: HEB 3-1978, f. & ef. 6-5-78; HEB 8-1989, f. 12-11-89, cert. ef. 1-1-90; HEB 1-1993, f. & cert. ef. 2-5-93

**Sabbatical Leave Reports 580-021-0215** At the end of the sabbatical leave, the staff member shall submit a report of the accomplishments and benefits resulting from the leave, filing copies with the department head, the dean and the president.

Stat. Auth.: ORS 351.070. Stats. Implemented: ORS 351.070. Hist.: HEB 3-1978, f. & ef. 6-5-78; HEB 8-1989, f. 12-11-89, cert. ef. 1-1-90; HEB 1-1993, f. & cert. ef. 2-5-93; HEB 5-1996, f. & cert. ef. 12-18-96

**Obligation to Return 580-021-0220** Each academic staff member, in applying for sabbatical leave, shall sign an agreement to return to the institution for a period of at least one year's service on completion of the leave. If an academic staff member fails to fulfill this obligation, the academic staff member shall repay the full salary paid during the leave plus the health care and retirement contribution paid by the institution on behalf of the academic staff member during the leave. This amount is due and payable three months following the date designated in the sabbatical agreement for the faculty member to return to the institution.

Stat. Auth.: ORS 351.07. Hist.: HEB 3-1978, f. & ef. 6-5-78; HEB 8-1989, f. 12-11-89, cert. ef. 1-1-90; HEB 1-1993, f. & cert. ef. 2-5-93

**Length of Leave for Academic-Year Staff 580-021-0225** Staff members employed on an academic-year basis are eligible for one of the following types of leave: (1) Academic-year staff other than the University of Oregon School of Law faculty: (a) One academic year (three terms) on 60 percent salary during the period of sabbatical leave; (b) Two-thirds of an academic year (two terms) on 75 percent salary during the period of sabbatical leave; (c) One-third of an academic year (one term) on 85 percent salary during the period of sabbatical leave. (2) Academic year staff at the University of Oregon School of Law: (a) One academic year (two semesters) on 50 percent salary during the period of sabbatical leave; (b) One-half academic year (one semester) on 100 percent salary during the period of sabbatical leave.

Stat. Auth.: ORS 240 & ORS 351.070. Stats. Implemented: ORS 351.070. Hist.: HEB 3-1978, f. & ef. 6-5-78; HEB 1-1983, f. & ef. 1-19-83; HEB 3-1984, f. & ef. 3-21-84; HEB 1-1993, f. & cert. ef. 2-5-93; HEB 5-1996, f. & cert. ef. 12-18-96

**Length of Leave for Fiscal-Year Staff 580-021-0230** Staff members employed on a fiscal-year basis are eligible for one of the following types of leave: (1) One year (12 months) on 60 percent salary during the period of sabbatical leave; (2) Two-thirds of a year (eight months) on 75 percent salary during the period of sabbatical leave; (3) One-third of a year (four months) on 85 percent salary during the period of sabbatical leave.

Stat. Auth.: ORS 351.070. Stats. Implemented: ORS 351.070. Hist.: HEB 3-1978, f. & ef. 6-5-78; HEB 1-1983, f. & ef. 1-19-83; HEB 1-1993, f. & cert. ef. 2-5-93; HEB 5-1996, f. & cert. ef. 12-18-96

**Cost of Sabbatical Leaves 580-021-0235** The cost of granting a sabbatical leave shall be financed within the funds allotted to the institution that employs the staff member.

Stat. Auth.: ORS 351.070. Hist.: HEB 3-1978, f. & ef. 6-5-78; HEB 1-1993, f. & cert. ef. 2-5-93

**Supplementing of Sabbatical Incomes 580-021-0240** Staff members on sabbatical leave may supplement their sabbatical salaries to a reasonable degree, provided that such supplementation strictly conforms to the stated and approved purposes of the sabbatical leave.

Stat. Auth.: ORS 351.070. Hist.: HEB 3-1978, f. & ef. 6-5-78; HEB 8-1989, f. 12-11-89, cert. ef. 1-1-90

**Policy Regarding Sabbatical Leave 580-021-0245** The policy on sabbatical leaves shall be uniform for all Department institutions insofar as possible.

Stat. Auth.: ORS 351.070. Hist.: HEB 3-1978, f. & ef. 6-5-78; HEB 8-1989, f. 12-11-89, cert. ef. 1-1-90; Renumbered from 580-021-0200(2); HEB 1-1993, f. & cert. ef. 2-5-93