

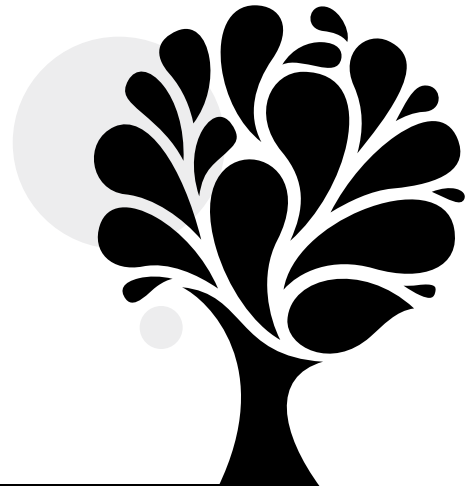
# **SABBATICALS: EFFECTIVE PRACTICES FOR PROPOSALS, IMPLEMENTATION AND FOLLOW-UP**

**ADOPTED SPRING 2008**

EDUCATION POLICIES COMMITTEE 2007-08

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## **ABSTRACT**

IN 2007, THE ACADEMIC SENATE FOR California Community Colleges adopted the paper *Sabbaticals: Benefiting Faculty, The Institution, and Students*. Based in part on survey results, it reiterated the fundamental value of the sabbatical leave concept, but uncovered wide disparities in implementation among California's community colleges. This paper proceeds from the assumption that sabbatical leave is crucial to the academic well-being of any institution, and then examines the three main procedural components of an effective leave policy: application and approval, actual leave activities, and final reporting and dissemination. Suggestions are made for how local academic senates can ensure that all three components function effectively together to encourage wide participation and produce a vibrant sabbatical leave program. This will greatly benefit the wider college family of students, faculty, institution and community.

## INTRODUCTION

THIS PAPER IS AN EXTENSION OF *Sabbaticals: Benefiting Faculty, The Institution, and Students*, which was adopted by the Academic Senate for California Community Colleges (ASCCC) at its Spring 2007 Plenary session. The 2007 paper was based on responses to the *Survey on Sabbatical Leave Policies and Practices*, which was distributed statewide and collected in Fall 2006. The survey examined sabbatical practices at community colleges throughout the state and received responses from 102 out of 109 California community colleges.

The survey was conducted while many colleges were still under the threat of suspension of sabbatical leaves owing to the pressure produced by the state's prior mid-year budget cuts. The resulting paper examined the purpose and philosophy behind the tradition of sabbatical leaves, in light of the survey responses. It concluded that while sabbaticals are "alive and well" within many of our colleges, there are great disparities in sabbatical leave policies and practices from one college or district to another. This, in turn, creates great disparities in participation, and consequently in the ultimate benefits gained by colleges, faculty and students. Some of the important variables include the percentage of full-time salary paid during a sabbatical leave, the number of sabbaticals funded per year, parties involved in the development of the sabbatical leave policy, the application review and approval processes, sabbatical activities allowed, and the post-sabbatical reporting requirements.

Each of these factors impacts the actual utilization of sabbatical leaves at the local level. A surprising finding of the 2007 paper was that over 60% of respondents reported that some available sabbaticals go unused (because of non-application, rejection of proposals or non-utilization of granted leaves). Some of the reasons cited by survey respondents include:

- ▶ That many faculty cannot afford to take leaves that are not fully funded (reported funding levels ranged from 20% to 100% of full time salary);
- ▶ That academic programs may suffer if a suitable replacement is not found; and
- ▶ That the application process is too cumbersome or too competitive.

Additionally, the survey showed that at a significant number of community colleges, sabbatical funding was frequently suspended during times of fiscal cutbacks. Almost 20% of survey respondents indicated that sabbaticals had been suspended at their colleges during the budget crises of the 2002-03 and 2003-04 academic years. During times of financial uncertainty, sabbaticals are often perceived by administrators or trustees as a luxury that can neither be afforded nor justified when facing a looming budget deficit. Local academic senates and collective bargaining agents should be prepared to collaborate in defense of sabbatical rights and to clearly communicate their value to the institution. The potential for future threats to sabbatical rights, as well as the significant disparities in policies, practices, and funding of sabbaticals among institutions plainly identify the need for a paper that examines effective practices for sabbatical leaves in the community colleges. A follow-up to the 2007 paper was called for in this resolution:

#### 19.04 S07 SABBATICAL LEAVE POSITION PAPER

Whereas, The Academic Senate's paper, *Sabbatical Rights*<sup>1</sup>, was written to respond to a specific resolution (19.01 F06 Support for Sabbatical Leave), and to specific survey data generated in response to that resolution;

Whereas, The paper, *Sabbatical Rights* introduces a variety of significant issues regarding the state of sabbatical leaves within the California Community Colleges, including:

- ▶ wide disparities between districts in the number of sabbatical leaves that are funded
- ▶ wide disparities between districts in the percentage of a full-time salary paid to faculty taking sabbatical leaves
- ▶ varied perceptions among faculty and boards of trustees about the purpose of sabbatical leaves
- ▶ differences in how sabbatical policies are developed, whether by academic senates, bargaining agents or administrations
- ▶ the fact that, according to the survey, 60% of all sabbaticals offered go unused;

Whereas, These issues and the recommendations of the paper need further research;

Resolved, That the Academic Senate for California Community Colleges should develop a position paper to further address sabbatical leave related issues introduced in the paper *Sabbatical Rights*; and

Resolved, That this paper should include best practices and recommendations to local academic senates.

In response to the resolution, this paper will extend the work of the 2007 paper by examining the components of a successful sabbatical leave program. It will consider the three phases of a sabbatical: the application and selection process, the activities of the implementation phase, and the final evaluation and dissemination phase. Local senates will be provided with examples of effective practices and with recommendations for policies and procedures to maximize both the quantity and quality of sabbatical leaves.

#### WHAT DOES THE LAW SAY ABOUT SABBATICALS?

While the specific details of sabbatical programs vary widely from district to district and are often contained in both district policy and collective bargaining contracts, there are some general legal requirements set by California Education Code. For example, the following are specified:

- ▶ **Purpose** (Section 87767): promoting travel or study which will benefit the schools and students of the district;

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<sup>1</sup> The full name of the adopted paper is *Sabbaticals: Benefiting Faculty, The Institution, and Students*, ASCCC adopted Spring 2007

- › **Length** (Section 87767): leave not to exceed one year—not necessarily continuous but must be completed within a three-year period;
- › **Frequency** (Section 87768): not more than one leave in each six-year period;
- › **Restrictions on Compensation** (Section 87769): not less than the difference between employee and replacement salaries (required);
- › **Alternative Method of Compensation** (Section 87769): at least one half salary, up to and including full salary (optional);
- › **Required Service on Return** (Section 87770): subsequent service for at least twice the period of the leave is required;
- › **Penalties** (Section 87771): salary repayment for failure to fulfill agreement—possible bond requirement;
- › **Reinstatement Rights** Section (87774): return to original position is guaranteed;
- › **Effect on Tenure** (Section 87776): shall not be construed as a break in service;
- › **Retention of Rights** (Section 87779): if institution transfers from one district to another (not if an employee transfers).

For the actual Education Code language, see Appendix A.



## BEFORE THE SABBATICAL—APPLICATION, REVIEW AND APPROVAL

### SABBATICAL APPLICATIONS

PROCEEDING FROM THE PREMISE OF THE 2007 paper that sabbatical leaves are valuable to both faculty and institutions, let us examine the various steps in the process with an eye to how local senates might help facilitate optimum use of available sabbaticals. The first hurdle faced by applicants is the application form itself, which may range from simple to complex. Simple application forms where the specific activities to be carried out are briefly summarized and justified on a few pages (for example, Appendix B, LACCD Sabbatical Application Form) are likely to encourage a larger number of applications to be submitted. Complex application forms in which many pages of detailed information on the applicant's background, service history to the college, sabbatical objectives, activities, timelines, and expected outcomes are required may initially discourage applicants (for example, Appendix C and Appendix D, List of requirements from Diablo Valley College and West Valley Mission District Application Cover Pages).

“An effective process should seek to maximize the ultimate utilization of sabbatical leaves by balancing two extremes, both of which discourage successful completion of sabbatical leaves...”

As a general rule the application requirements for sabbaticals appear to be more stringent and rigorous when leaves are funded at a higher percentage of the instructor's full time salary. It is likely

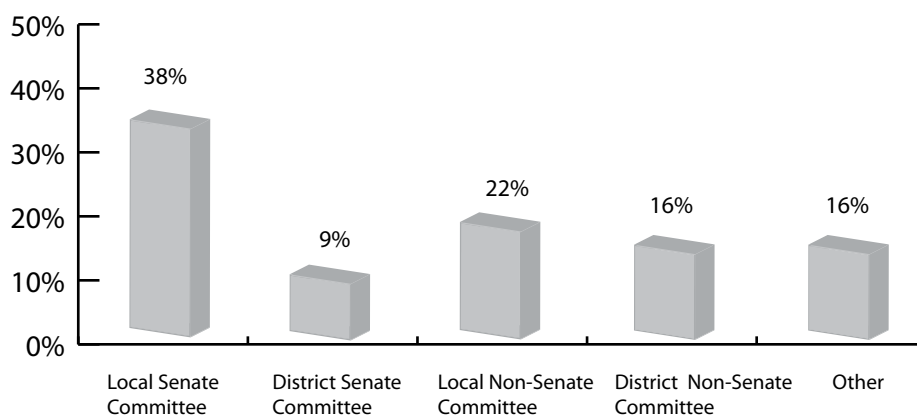
that colleges or districts with more generous compensation levels generate higher faculty interest in sabbatical leaves, making the process more competitive. On the other hand, colleges or districts which compensate sabbaticals at lower levels appear to be less likely to have rigorous application requirements or to place limitations on the number of sabbaticals because there is less competition for them.

An effective process should seek to maximize the ultimate utilization of sabbatical leaves by balancing two extremes, both of which discourage successful completion of sabbatical leaves: approval mechanisms with elaborate requirements or intense competition will discourage applications—even if they offer high compensation for those leaves awarded; and simple approval processes for a low compensation leave may well result in low acceptance rates of those awards. The ideal, of course, would be a sabbatical program that combines high compensation with an uncomplicated application process, thus leading to high faculty participation, and to results that are valuable for all members of the college community.

## SABBATICAL REVIEW AND APPROVAL PROCESS

The next step for an application is review and evaluation of the proposal, which can be carried out by a wide variety of parties, and which may or may not involve competitive ranking.

**FIGURE 1: PARTIES RESPONSIBLE FOR THE REVIEW OF SABBATICAL APPLICATIONS (%)**



(Source: Academic Senate Fall 2006 Survey)

The parties responsible for the review of sabbatical leave applications vary widely from one college to another. According to the 2006 survey responses, at 47% of colleges sabbatical leave applications are reviewed by a committee under the aegis of either the local (38%) or district (9%) academic senates. At 38% of colleges applications are reviewed by either a local (22%) or district (16%) committee that is not under the aegis of the academic senates. Such committees often include collective bargaining representation. Finally, at 17% of colleges applications are reviewed by other individual(s) or groups including department chairs, deans, vice presidents, college presidents, human resources personnel, chancellor, and/or the governing board. In many cases the committees that review the sabbatical leave applications will make recommendations which are then forwarded to a vice president, college president, chancellor, and/or local governing board for final approval.

The review process at some colleges or districts may simply involve verification that the minimum requirements for a sabbatical leave application are met, for example, course units to be taken, or travel plans, are properly indicated. Other institutions have a more rigorous review process which may use a scoring matrix or rubric to rank sabbatical proposals (for example, Appendix E, Diablo Valley College Rubric). In this example, the initial complexity of the application, mentioned above, may ultimately lead to selection of projects that are more likely to provide tangible benefits to the college community. Such rubrics can be used to evaluate proposals based on criteria that include benefit to students, college, district or community, implementation and timeline of activities, proposed end product(s), past contributions to the college or district, length of service, prior sabbatical leaves, department and applicant needs, completeness, documentation, and dissemination plan. When districts limit the number of sabbaticals, such evaluations become competitive and care must be taken not to focus on a single measurement of benefit. Published rubrics encourage an open and transparent process.

One of the important considerations that a selection committee should take into account when awarding a sabbatical is whether the proposal contains a clear set of objectives and outcomes. This will aid later in determining if the project has been satisfactorily completed. Those proposals which have ill defined objectives and outcomes should not be summarily rejected, but there should be an opportunity to meet with the committee to receive assistance with refining proposals.

Clearly, an effective application and selection process must balance simplicity with the collection of sufficient information to identify worthwhile proposals. Review committees composed mainly of faculty members are likely to impart academic integrity to the entire process and to encourage widespread faculty participation across the institution.

### **EFFECTIVE METHODS TO ENCOURAGE AND PROMOTE SABBATICAL LEAVES**

To achieve high utilization of sabbaticals, the process has to both encourage applications, and subsequently encourage faculty implementation of approved sabbatical leave awards. There are several approaches that can effectively encourage faculty

in successful applications for sabbatical leaves that benefit both the institution and the applicant. Almost 40% of survey respondents indicated that a sabbatical handbook was available at their institutions, while 51% indicated that sabbatical workshops to inform faculty of the process were held on a regular basis. Many districts have an article in their faculty

“Clearly, an effective application and selection process must balance simplicity with the collection of sufficient information to identify worthwhile proposals.”

bargaining unit contract, which describes the sabbatical leave policy. A significant number of respondents indicated that the contract was their major source of information on sabbaticals. A particular effort should be made to make information and examples widely available, and to encourage applications that go beyond traditional “academic” disciplines and activities.

Low or partial compensation appears to be a major barrier to acceptance of some sabbaticals. One mechanism that has encouraged sabbaticals at colleges in which they are only partially compensated has been for the bargaining unit to negotiate an option to allow faculty to combine a sabbatical leave with some other type of load generation such as a Load Credit Leave or Banked Load, which allows them to receive 100% of their salary while on sabbatical leave (for example, Appendix F, LACCD AFT Contract, Article 25.O). Many districts have negotiated such mechanisms which permit load to be accumulated elsewhere, for example by teaching overload classes, and then used at a later date. Another mechanism that preserves full salary is a 70% sabbatical leave combined with 30% normal duties.

A variety of other methods that respondents to the survey found to be effective in encouraging sabbaticals include:

- ▶ Letters, e-mails, flyers, newsletters and memos announcing application timelines;
- ▶ Available library of past, successful sabbatical applications;
- ▶ Mentorship of sabbatical applicants by other faculty members;
- ▶ Post-Sabbatical Seminars to disseminate information to campus community;
- ▶ Submission of post-sabbatical reports to the local academic senate, Sabbatical Leave or Professional Development Committees;
- ▶ Resource person such as a librarian who shares information and materials with potential applicants;
- ▶ Workshops on how to apply for sabbaticals at Opening or Flex Days.

In some locations, the ability to share projects and results with neighboring colleges and districts could be beneficial.

## DURING THE SABBATICAL—ACTIVITIES

AN ACADEMIC SABBATICAL TYPICALLY IS A length of time away from normal teaching duties in order to fulfill some goal. Sabbaticals also have a sense, going back to Biblical antecedents, of being a period of rest and renewal that takes place every seven years. Though no sabbatical policy provides leave solely for *rest*, a wide range of activities can provide professional renewal that reinvigorates faculty and their commitment to the profession. The traditional idea of scholarly activities away from immediate professional obligations has produced a fairly standard list of activity categories appropriate for sabbatical leaves. Such lists are sometimes enshrined in collective bargaining agreements or board policies. In a system as large and diverse as the California community colleges, value from sabbatical leaves can be found in a wide range of activities. An effective district process will encourage and support a broad variety of activities across the institution.

Some of the more traditional activities include:

- Formal (institutional) study
- Informal (independent) study
- Travel
- Work experience
- Curriculum development
- Other scholarly or creative activities
- A combination of the above.

Formal (institutional) study refers to a sabbatical where the faculty member takes classes at a college or university for professional development, usually related to or growing out of their current discipline and teaching assignment. The goal could also be interdisciplinary enrichment or even preparation for a new teaching assignment, if this was seen to advance the mission of the college.

Informal (independent) study refers to a sabbatical where the faculty member develops his/her own course of study in a particular subject. This may require more description than formal study. The subject being studied may be unique, specialized, or so new that there are no formal classes available. Or, the applicant may already possess a terminal degree and have interests or needs outside the area best served by additional course work.

Travel refers to a sabbatical leave involving travel to specific places outside the local area. These journeys are usually combined with the gathering of photographic resources or access to written resources unique to particular locations. The faculty member may also be doing research or interviewing subjects at various locations. This type of sabbatical can be especially useful for disciplines involved in the comparison of different cultures or surveys of international resources in the arts, humanities, and social sciences.

Work experience refers to a sabbatical leave to work as an intern in a particular business or industry. This work may or may not be compensated, depending on state regulation, local policy or contract language. This type of sabbatical is usually taken by Career Technical Education (CTE) faculty in order to remain current in

their field, for work experience in the field in which the member teaches, or for study in schools maintained by a business or industry.

Curriculum development refers to a sabbatical leave to develop specific curriculum for a new program or to expand an existing program. While some of this work usually takes place in the course of a faculty member's regular assignment, a sabbatical leave can be an effective way to develop a significant amount of new curriculum in a timely manner. It can also be a very effective professional development activity and can help fulfill one goal of a sabbatical - the renewal and refreshing of the faculty member's commitment to and involvement in their discipline and program.

Both legislation and accreditation standards have focused increasing attention on the crucial use of data collection and evaluation in course design and academic planning, so in addition to curriculum development focused on developing new or revised courses, colleges may wish to identify faculty with interests in increasing their expertise on the improved planning that results from the collection and interpretation of institutional data.

Other scholarly or creative activities refers to a sabbatical leave involving research, writing, artistic activities, or other discipline-related work. This type of sabbatical includes such projects as research, scholarly writing (articles for peer reviewed scholarly journals, for example), other creative writing, art work for juried art shows, musical compositions, dance choreography, or other projects that make a significant contribution to one's field. Judging the significance of projects involving artistic expression might well involve some peer review process.

Increasingly, community college faculty also recognize that disciplinary expertise is not sufficient to assure excellence as a teacher, and a wide range of sabbatical projects might be focused on enhancing the pedagogical skill of faculty members. This would be particularly appropriate in light of the System Basic Skills Initiative.

Sabbaticals could also involve a combination of the above activities. The idea of a sabbatical should inspire excitement and creativity on the part of those applying. The need to demonstrate value to the institution should not turn the application process into a competition for who can promise most. The chance to devote a semester or a year to scholarly activity can lead to unique proposals that may not fit neatly into the above categories. While many colleges recognize the value of original sabbatical proposals that meet the specific needs of a particular discipline or academic program it is important not to limit projects to narrow discipline needs. Faculty and colleges can benefit from professional development in broader areas such as techniques and strategies appropriate to basic skills, or distance education, or leadership. Sabbaticals could also be used as part of a faculty retraining program in an alternative or additional discipline. Sabbaticals might even be used to gain experience or perspective in a temporary administrative position.

### **SOME CREATIVE EXAMPLES**

By its very nature, a list of examples will not capture all that is possible in the way of original, creative or inspiring sabbatical projects, but the following sample might encourage exploration of a broad range of

activities that are perhaps beyond the traditional categories above<sup>2</sup>. Sabbatical committees should share creative examples with faculty and indicate their openness to such proposals.

- › Gain @ONE Project certification for online instructors;
- › Complete Economic/Workforce Development Initiative course on use of simulation;
- › Incorporate bioinformatics resources and databases, and gene identification tools, for student exploration in biology courses;
- › Compare Braille versus current software for visually impaired students;
- › Research student financial literacy to remove financial barriers to student success;
- › Investigate changing theories of reference librarianship and current real world reference delivery practices;
- › Compile Photo/Essay on changes in California's physical and cultural landscape;
- › Collect controversial macroeconomic case studies for student debate;
- › Work as an early childhood education intern to supplement pedagogical approaches;
- › Job shadow a public office holder as part of a political science project;
- › Job shadow an industry position for a vocational field and document job skill requirements;
- › Conduct an extensive study on what is involved today in publishing original literary works;
- › Develop processes whereby students conduct original research that relates directly to the local community;
- › Visit selected academic, vocational, basic skills, or counseling programs at other community colleges throughout the state;
- › Work with local K-12 schools to create incentives for students to graduate from high school and attend college;
- › Develop classroom research or assessment projects;
- › Develop expertise in collection and analysis of institutional data;
- › Travel to Costa Rica to improve skills in techniques of bird-banding and resultant data analysis;
- › Research carotenoids in fruits and vegetables, to result in a handbook for chemistry students;
- › Travel to Central America to study basic skills standards in K-12 with potential application to second language students;
- › Take graduate course work in Japan to gain insights into contemporary issues in Japanese culture and society;
- › Conduct independent research in economics to produce a student reader to supplement standard textbook;
- › Visit programs that offer non-native English public speaking—to update textbook;
- › Take a leadership position in a professional organization;

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<sup>2</sup> Thanks to the Sabbatical Committee at Santa Monica College for several of the examples.

- ▶ Participate in a faculty exchange program (such as Fulbright scholars);
- ▶ Carry out a classroom observation program with colleagues to gain pedagogical insight or to identify potential future collaboration.

One difficulty experienced by applicants is obtaining information or even awareness of potential projects—some of which are system grant funded projects such as @ONE. Much greater coordination between the sabbatical process and the overall professional development effort at the college, and at the state level, would encourage better information flow and would permit the district to target areas of interest such as basic skills. Districts should also consider how to train sabbatical committee members so that institutional memory and momentum is preserved as committee membership changes.

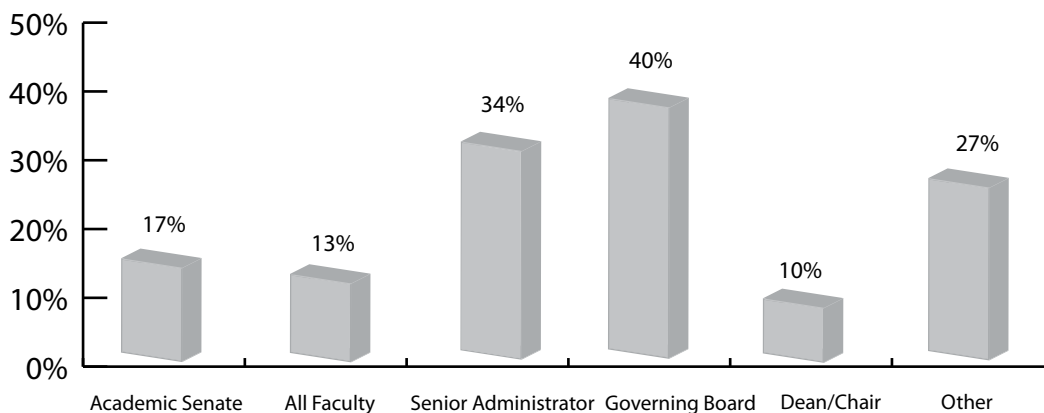


## AFTER THE SABBATICAL—EVALUATION AND DISSEMINATION

THE FINAL STEP OF THE SABBATICAL process occurs after the activities are completed. Normally there will be a report to some compliance individual or group. Potentially much more valuable is a mechanism for dissemination of useful results to both the wider college community and the public at large.

The lack of meaningful reporting and poor accountability are commonly perceived as significant problems that undermine the integrity of the sabbatical process and undermine the status of sabbatical leaves as a valuable faculty right. The 2006 survey revealed that reporting mechanisms again vary widely from one institution to another. At many colleges post-sabbatical reports are submitted to the local governing board (40%) or to a senior administrator such as the college president or vice president (34%). Only a small number of respondents indicated that a report was provided to the local academic senate (17%) or the faculty at large (13%). A smaller number of respondents indicated that reports were provided to department chairs, deans, Sabbatical Leave Committees, Professional Development Committees, the Chancellor, Office of Human Resources, or a joint Senate-Union Committee.

**FIGURE 2: PARTIES RECEIVING POST-SABBATICAL REPORTS (%)**



(Source: Academic Senate Fall 2006 Survey)

### EVALUATION OF THE COMPLETED SABBATICAL

The post-sabbatical reporting process has a dual role to play. It has a compliance function to ensure the integrity of the process and a communication function to spread valuable results to the larger college community and encourage others to apply for future sabbaticals.

The compliance portion typically involves a timely report to an individual or group, but faculty involvement in this step varies considerably. For example, at San Joaquin Delta College all sabbatical reports must be submitted within 60 days of the return from the sabbatical leave to the Faculty Professional Growth Committee, composed of six faculty members. The Committee reviews the completed reports to see if the objectives that the faculty member established for his/her sabbatical have been met. At this stage it becomes evident that a well written sabbatical proposal with clear objectives and outcomes is very important in the evaluation process of the completed sabbatical. In contrast to the process at San Joaquin

Delta College, sabbatical reports at Diablo Valley College are submitted directly to the College President for approval. An evaluation process that is objective, transparent and involves review by faculty peers is more likely to encourage participation in the sabbatical process.

At San Joaquin Delta College, if the completed sabbatical does not produce the outcomes outlined in the proposal, then the Chair of the Faculty Professional Growth Committee will meet with the faculty to review the objectives that have not been met and request that the completed report be resubmitted with the recommended revisions. The Committee then recommends to the administration acceptance or rejection of the sabbatical report.

Failure to complete the stated outcomes may result in various actions. At San Joaquin Delta College, an official reprimand by the Board of Trustees may be placed in the personnel record. Failure to complete the sabbatical may also result in full or partial repayment of the salary paid to the recipient during the sabbatical leave. In general, Education Code also requires that faculty on sabbaticals must serve at least twice the time period of the sabbatical when they return. Failure to serve the required length of time may result in full or pro-rated repayment of the salary paid to the recipient during the sabbatical leave. Many colleges require a sabbatical bond to guarantee this financial commitment.

### **DISSEMINATION AND VALUE TO THE WIDER COMMUNITY**

In addition to compliance, there are many opportunities to use the outcome of sabbaticals in a positive manner to benefit the college and its students, beyond the immediate sphere of influence of the individual faculty member. At Santa Monica College, opening day activities include presentations on recently completed sabbatical projects. This could be used to disseminate information as well as to welcome back the faculty member. Santa Monica's report form also seems designed to elicit information that will be more widely useful with questions such as:

- › Did you achieve or accomplish anything that you did not expect?
- › Identify any challenges and how you overcame them;
- › What do you feel will be the short and long term impact of your project on faculty, students, department, college and community?

In addition to sharing such information with colleagues at the college and encouraging replication in additional college activities, consideration should be given to publicizing successful projects as a way to build support for the concept of sabbaticals or, more generally, for the college in its surrounding community. Potential strategies might include:

- › Document benefits to local K-12 system;
- › Document benefits to local businesses and employees;
- › Share information with local chamber of commerce or local newspaper and media outlets;
- › Present results at a Board of Trustees meeting;
- › Make a public presentation in the local community;
- › Create publicly available web pages on the college web site;
- › Share with discipline colleagues at professional conferences;
- › Create an annual report of sabbatical projects for use in district publicity material.

## CONCLUSION

SABBATICAL LEAVES CAN PROVIDE A VIBRANT ongoing source of professional development and renewal that benefits all aspects of an institution—often in unanticipated ways. This was illustrated in a particularly poignant manner in a story shared by Riverside City College general automotive instructor Richard Rodman. He commented on his enlightening sabbatical experience in the general education portion of a bachelor’s degree program. Previously he had over thirty-years experience as a professional auto mechanic, a Ford factory trainer and a Riverside vocational instructor. He wrote:

... it was not until fortune shone upon me that I was awarded a sabbatical ...

... after years of teaching auto mechanics I was finally learning how to teach ...

... suddenly my instruction was purposeful, systematic, holistic, quantifiable ...

... I was not only a subject matter expert, I was also a teacher ...

Colleges should do everything they can to establish, nurture, and preserve wide-ranging, effective sabbatical leave programs. This involves a thoughtful examination of process before, during and after the sabbatical to encourage a large and diverse pool of applicants and approved projects. And it involves financial arrangements that provide sufficient compensation for faculty to actually accept the sabbatical awards. Local academic senates should use the following recommendations to improve the sabbatical leave program at their college.

## RECOMMENDATIONS

- 1) Local academic senate should remain vigilant in protecting the fundamental philosophy and value of the sabbatical leave concept, as recommended in *Sabbaticals: Benefiting Faculty, The Institution, and Students*;
- 2) Colleges should promote sabbatical leaves as a recognized facet of professional development that is valuable to students, faculty members, the institution, and the surrounding community;
- 3) All phases of the sabbatical leave process (application/activities/report) should encourage wide and diverse participation by faculty;
- 4) There should be a strong connection between sabbatical programs and the wider professional development goals of the college or district;
- 5) Participation in sabbatical programs should be across the institution—involving transfer, developmental, vocational, non-credit, and non-classroom faculty;
- 6) The sabbatical process should provide an opportunity for the development of cross-discipline strategies or broader pedagogical techniques to encourage expansion beyond discipline based qualifications;
- 7) Sabbatical applications and reports should be evaluated by a predominantly faculty committee;
- 8) The process for evaluating both proposals and completed sabbatical reports should be objective and transparent;
- 9) There should be an effective process for encouraging improvement or re-submittal of proposals that are not initially approved or are not funded;
- 10) There should be an effective dissemination/replication process for sabbatical results, to achieve widespread use and awareness in the broader college community;
- 11) Local academic senates should collaborate with collective bargaining agents to preserve funding for sabbatical leaves in times of budget reductions.

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## **APPENDICES**





## **APPENDIX A. EDUCATION CODE LANGUAGE REGARDING SABBATICALS**

### **SECTION 87767 (LENGTH OF SABBATICAL LEAVES)**

The governing board of a community college may grant any employee of the district employed in an academic position, a leave of absence not to exceed one year for the purpose of promoting travel or study by the employee which will benefit the schools and students of the district. The governing board may provide that such a leave of absence be taken in separate six-month periods or separate quarters rather than for a continuous one-year period, provided that the leave of absence for both of the separate six-month periods or any or all quarters shall be commenced and completed within a three-year period. Any period of service by the individual intervening between the two separate six-month periods or separate quarters of the leave of absence shall comprise a part of the service required for a subsequent leave of absence.

### **SECTION 87768 (FREQUENCY OF SABBATICAL LEAVES)**

Notwithstanding any other provision of this **code**, the governing board of any community college district may grant a leave of absence under Section 87767 to any academic employee who has rendered service to the district for at least six consecutive years preceding the granting of the leave, but not more than one such leave of absence shall be granted in each six-year period. The governing board granting the leave of absence may prescribe the standards of service which shall entitle the employee to the leave of absence. No absence from the service of the district under a leave of absence, other than a leave of absence granted pursuant to Section 87767, granted by the governing board of the district shall be deemed a break in the continuity of service required by this section, and the period of the absence shall not be included as service in computing the six consecutive years of service required by this section. Service under a national recognized fellowship or foundation approved by the board of governors, for a period of not more than one year, for research, teaching or lecturing shall not be deemed a break in continuity of service, and the period of the absence shall be included in computing the six consecutive years of service required by this section.

### **SECTION 87769 (COMPENSATION FOR SABBATICAL LEAVES)**

Every employee granted a leave of absence pursuant to Section 87767 may be required to perform such services during the leave as the governing board of the district and the employee may agree upon in writing, and the employee shall receive such compensation during the period of the leave as the governing board and the employee may agree upon in writing, which compensation shall be not less than the difference between the salary of the employee on leave and the salary of a substitute employee in the position which the employee held prior to the granting of the leave. However, in lieu of such difference, the board may pay one-half of the salary of the employee on leave or any additional amount up to and including the full salary of the employee on leave.

### **SECTION 87770 (REQUIRED SERVICE AFTER SABBATICAL LEAVES)**

Every employee, as a condition to being granted a leave of absence pursuant to Section 87767, shall agree in writing to render a period of service in the employ of the governing board of the district following his or her return from the leave of absence which is equal to twice the period of the leave. Compensation granted by the governing board to the employee on leave for less than one year may be paid during the first year of service rendered in the employ of the governing board following the return of the employee from the

leave of absence or, in the event that the leave is for a period of one year, the compensation may be paid in two equal annual installments during the first two years of service following the return of the employee. The compensation shall be paid the employee while on the leave of absence in the same manner as if the employee were teaching in the district, upon the furnishing by the employee of a suitable bond indemnifying the governing board of the district against loss in the event that the employee fails to render the agreed upon period of service in the employ of the governing board following the return of the employee from the leave of absence. The bond shall be exonerated in event the failure of the employee to return and render the agreed upon period of service is caused by the death or physical or mental disability of the employee. If the governing board finds, and by resolution declares, that the interests of the district will be protected by the written agreement of the employee to return to the service of the district and render the agreed upon period of service therein following his or her return from the leave, the governing board may waive the furnishing of the bond and pay the employee on leave in the same manner as though a bond is furnished.

#### **SECTION 87771 (PENALTIES FOR FAILING TO FULFILL REQUIRED SERVICE)**

If the employee does not serve for the entire period of service agreed upon under Section 87770, the amount of compensation paid for the leave of absence shall be reduced by an amount which bears the same proportion to the total compensation as the amount of time which was not served bears to the total amount of time agreed upon. If the employee furnished an indemnity bond, upon default, the proceeds of the bond shall be divided between the employee and the community college district in the same proportion as the actual amount of time served bears to the amount of time agreed upon.

#### **SECTION 87774 (REINSTATEMENT RIGHTS AFTER SABBATICAL LEAVES)**

At the expiration of the leave of absence of the employee, the employee, unless he or she otherwise agrees, shall be reinstated in the position held by him or her at the time of the granting of the leave of absence.

#### **SECTION 87776 (TENURE)**

No leave of absence when granted to a contract employee shall be construed as a break in the continuity of service required for the classification of the employee as tenure. However, time spent on any unpaid leave of absence shall not be included in computing the service required as a prerequisite to attainment of, or eligibility for, tenure.

#### **SECTION 87779 (RETENTION OF SABBATICAL RIGHTS)**

When a community college or other place of employment shall have been transferred from one district to another, any academic employees who transfer with the school or other place of employment shall be entitled to retain all sickness and injury, sabbatical and other leave rights accumulated by service prior to the transfer and the district to which the school or other place of employment has been transferred shall recognize or grant those rights, including any accumulated rights allowed by the governing board of the district from which the school or other place of employment was transferred, as fully as if there had been no change in the district maintaining the school or other place of employment.

Please note that Appendices B through F are not suggested as “best practices” or models. They have been used to illustrate specific pros and cons in the text.

## APPENDIX B. APPLICATION FORM (LOS ANGELES DISTRICT)

### LOS ANGELES COMMUNITY COLLEGE DISTRICT HUMAN RESOURCES DIVISION

#### Study Plan-Sabbatical

I. STATEMENT OF PURPOSE: Prepare as directed on the reverse side of this form.

II. INFORMATION REQUIRED: Be precise. List exact information as obtained from the official college or university catalog or announcement.

A. Enter the month and day of your enrollment, e.g. Sept. 20—Jan.18.

B. List complete course number as listed in official catalog. Be sure to include department name and all course numbers and/or letters.

C. Because of the difficulty in scheduling classes prior to registration, you may wish to list several courses, from which you will select classes sufficient to meet the minimum study requirements of 5 semester units or 8 quarter units for each semester of leave. (The minimum unit requirement for administrators is 8 semester units or 12 quarter units per half-year of leave).

#### First Semester of Leave

Enrollment Dates		Institution	Course	Course	Units	
From	To		Number	Title	Semester	Quarter

I PLAN TO COMPLETE \_\_\_\_\_ SEMESTER UNITS AND/OR \_\_\_\_\_ QUARTER UNITS FOR THE FIRST SEMESTER.

Complete only if taking courses consecutively. If taking a split sabbatical, another form should be completed at that time.

#### Second Semester of Leave

Enrollment Dates		Institution	Course	Course	Units	
From	To		Number	Title	Semester	Quarter

I PLAN TO COMPLETE \_\_\_\_\_ SEMESTER UNITS AND/OR \_\_\_\_\_ QUARTER UNITS FOR THE SECOND SEMESTER.

Any change in these plans requires prior approval.

#### Committee Approval:

Signature of Applicant \_\_\_\_\_ Date \_\_\_\_\_

Sabbatical Leave Committee \_\_\_\_\_ Date \_\_\_\_\_

**THIS SIDE MUST BE COMPLETED BY APPLICANTS FOR A SABBATICAL LEAVE**

**STATEMENT OF PURPOSE**

The California Education Code, Section 87767 states that sabbatical leaves may be granted, "... for the purpose of permitting study or travel by an employee which will benefit the schools and students of the district." Applicants are requested to provide a statement which will clarify their proposal in regard to this requirement, and which will provide the committee with sufficient information to evaluate the request.

It is suggested that the applicant include such points as: educational objectives, relation of the program to their subject or area of service, contribution to professional growth and possible application to future instruction. If the proposal deviates from any of the established criteria, the applicant should carefully indicate the reasons which would justify an exception being made.

(USE SPACE PROVIDED BELOW)

## APPENDIX C. APPLICATION COVER SHEET (DIABLO VALLEY COLLEGE)

### Proposal # 15

Title \_\_\_\_\_

2008-09 Academic Year       Fall 2008       Spring 2009

Have you included the following?

- 1. Sabbatical Application - Form A
- 2. An abstract
- 3. The goals
- 4. Project objectives
- 5. Qualifications, training, teaching assignment
- 6. Timeline estimate
- 7. Reporting methods
- 8. Expected results
- 9. Collegiality statement
- 10. Criteria for sabbatical
- 11. Validation by committee

## **APPENDIX D. APPLICATION COVER SHEET (MISSION WEST VALLEY DISTRICT)**

### **WEST VALLEY-MISSION COMMUNITY COLLEGE DISTRICT INSTRUCTIONS AND APPLICATION FORM SABBATICAL LEAVE PROPOSALS**

*Please read all instructions in this packet carefully and follow them explicitly. Before writing your proposal, review the Guidelines for Sabbatical Leaves and Article 40 of the ACE/District Contract thoroughly.*

#### **FORMAT FOR PROPOSAL**

- ▶ Use the Cover Sheet and Bond Provision Statement provided each year by the committee. These will be pages 1 and 2 of your proposal.
- ▶ You may use the form provided in this packet, or you may type your application separately. If you do not use this form, be sure to follow the instructions within it carefully.
- ▶ Organize your proposal into five (5) sections as indicated on the application form. Because each section will receive a separate point score, be sure that you have included every section.
- ▶ Write your responses for each section on a separate page when indicated on the application.
- ▶ Limit your Statement of Purpose to 250 words or less.
- ▶ Limit your responses in Section II to 250 words or less for each section (A, B, C, and D).

#### **CONTENT FOR PROPOSAL**

- I Statement of Purpose
- II Rationale
  - A. Professional Development
  - B. Value to Department or Discipline
  - C. Value to College and/or District
  - D. Value to Students
- III Implementation
  - A. Implementation Procedure
  - B. Project Results
  - C. Dissemination Plan: Benefit to Colleagues
- IV Past Contributions to the District
  - A. Scholarship
  - B Service
    - 1. Department
    - 2. College
    - 3. District
    - 4. Community
- V Length of Service

## APPENDIX E. SCORING RUBRIC (DIABLO VALLEY COLLEGE)

Name of Applicant \_\_\_\_\_ Date \_\_\_\_\_

### HOLISTIC EVALUATION SCORING PROCESS Rubrics for Evaluating Sabbatical Leave Applications

	9	8	7	6	5	4	3	2	1
1.	Plan of work will greatly benefit students, educational programs or staff/colleagues				Plan of work does not significantly benefit students, educational programs or staff/colleagues				

	9	8	7	6	5	4	3	2	1
2.	Plan of work will greatly enhance applicant's background and improve professional competence				Plan of work suggests little which would enhance applicant's background or improve professional competence				

	9	8	7	6	5	4	3	2	1
3.	Plan of work relates significantly to applicant's professional assignment				Plan of work does not relate significantly to applicant's professional assignment				

	9	8	7	6	5	4	3	2	1
4.	Breadth and depth of the project appropriate for sabbatical leave rather than the regular teaching year				Breadth and depth of the project not appropriate for sabbatical leave rather than the regular teaching year				

	9	8	7	6	5	4	3	2	1
5.	Proposed objectives are significantly delineated and appropriate to the project				Proposed objectives are inadequately delineated and inappropriate to the project				

	9	8	7	6	5	4	3	2	1
6.	Proposed evidence of completion is clearly delineated, matches objectives, and appropriate to the project					Proposed evidence of completion is not adequately delineated, does not match objectives, and is not appropriate to the project			

	9	8	7	6	5	4	3	2	1
7.	Proposed time line and activities in plan of work are spelled out and appropriate to the project					Proposed time line and activities in plan of work are not spelled out and are not appropriate to the project			

	9	8	7	6	5	4	3	2	1
8.	Scope of activities and intent of Plan of Work highly proportionate to length of leave					Scope of activities and intent of Plan of Work not in proportion (too little, too much) to length of leave			

	9	8	7	6	5	4	3	2	1
9.	High overall impression, i.e., professionalism, thoroughness, commitment, completeness, effort					Low overall impression, i.e., lacking in professionalism, thoroughness, commitment, completeness, effort			

**Should This Proposal Be Considered For Ranking?**

Yes \_\_\_\_\_ No\_\_\_\_\_



## APPENDIX F. LOAD–AFT CONTRACT, ARTICLE 25.0 (LOS ANGELES DISTRICT)

### J. LOAD CREDIT LEAVE (*MANDATORY*)

1. **Definition.** A Load Credit Leave is an earned leave to which a faculty member becomes entitled under the provisions contained in Article 39, Load Banking. The District does not require a faculty member who is on a Load Credit Leave to engage in any prescribed set of activities, but Load Credit Leaves are intended to provide faculty members with an opportunity for professional growth, development and renewal that benefits the faculty members themselves and, ultimately, their students.

2. **Requirements.** Only tenured faculty members who meet the requirements contained in Article 39, Load Banking, are eligible for a Load Credit Leave. A Load Credit Leave is either a half-time leave of absence or a full-time leave of absence. **A half-time Load Credit Leave may be combined with a half-pay sabbatical leave of absence.**

3. **Length of Leave.** A Load Credit Leave is a leave of absence for one academic term.

4. **Compensation.** During a Load Credit Leave a faculty member will receive full pay and benefits.

### O. SABBATICAL LEAVE (*MANDATORY*)

e. An employee shall be paid one-half of his/her regular salary for the period of the leave.

g. **A Sabbatical Leave may be combined with a Load Credit Leave.**

