



Memorandum

Office of the Provost

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TO: Senate

FROM: Lydia White, Associate Provost (Policies, Procedures & Equity)

SUBJECT: Proposed revisions to *Regulations on Sabbatic Leaves for Tenure Track and Tenured Academic Staff* and *Regulations on Leaves of Absence for Tenure Track and Tenured Academic Staff*

DATE: November 19th, 2014

DOCUMENT #: D14-18

ACTION REQUIRED: INFORMATION APPROVAL/DECISION

ISSUE: Senate approval of changes to the *Regulations on Sabbatic Leaves for Tenure Track and Tenured Academic Staff* and the *Regulations on Leaves of Absence for Tenure Track and Tenured Academic Staff*, which are proposed largely for the purpose of clarifying and simplifying existing policies and procedures.

BACKGROUND & RATIONALE: The *Regulations on Sabbatic Leaves for Tenure Track and Tenured Academic Staff* were last updated by Senate and the Board of Governors in 2010, and the *Regulations on Leaves of Absence for Tenure Track and Tenured Academic Staff* were last updated by Senate and the Board of Governors in 2011.

Revisions are proposed which are mostly ‘housekeeping’, including making explicit certain procedures that have always been in place though not articulated in the Regulations (for example, allowing pre-tenure academic staff to apply for sabbatic leave to be taken once tenure is granted). Some changes are intended to reduce the amount of bureaucracy involved in the process (e.g. removing the requirement for the VP(RIR) to approve leaves). As much as possible, the revisions include making the two sets of regulations more consistent with each other.

Additions/substitutions are indicated in red. Minor changes are underlined in black. Comments in the sidebar provide explanations and deletions.

MOTION OR RESOLUTION FOR APPROVAL: *Be it resolved that Senate approve, and recommend to the Board of Governors for approval, the proposed changes to the Regulations on Sabbatic Leaves for Tenure Track and Tenured Academic Staff and the Regulations on Leaves of Absence for Tenure Track and Tenured Academic Staff, as detailed in Appendix A and B.*

PRIOR CONSULTATION: Deans; MAUT.

NEXT STEPS: Submission to the Board of Governors for approval on December 2, 2014.

APPENDICES: Appendix A. *Regulations on Sabbatic Leaves for Tenure Track and Tenured Academic Staff*
Appendix B. *Regulations on Leaves of Absence for Tenure Track and Tenured Academic Staff*

Regulations on Sabbatic Leaves Tenure Track and Tenured Academic Staff

Current	Proposed
<p>1 PREAMBLE</p> <p>1. 1 Sabbatic leave is an extended period of paid leave for the pursuit of academic work or scholarship intended to enrich the intellectual life of the University.</p> <p>Through sabbatic leave the University provides members of the academic and librarian staff with an opportunity to enhance their ability to contribute to the research and teaching activities of the University.</p> <p>During sabbatic leave, the requirement of staff members' availability for normal academic duties at the University as defined in the Regulations Relating to the Employment of Academic Staff and the Regulations Relating to the Employment of Librarian Staff is waived.</p> <p>However, the release from academic duties requires staff members to devote time to scholarly inquiry and writing, and/or the improvement of professional skills. Sabbatic leave may also be used by staff members to:</p> <p>(i) obtain a fresh perspective on an old problem; (ii) begin a new and promising line of research and scholarly activity; or (iii) enhance their knowledge of their subject, discipline, profession or professional practice in order to improve the performance of their academic duties.</p>	<p>SECTION 1 – PURPOSE, SCOPE AND DEFINITIONS</p> <p>1.1 Purpose</p> <p>Sabbatic leave is an extended period of paid leave granted to tenured academic staff for the pursuit of academic scholarship intended to enrich the intellectual life of the University.</p> <p>Through sabbatic leaves, the University provides eligible members of the academic staff with an opportunity to enhance their knowledge and ability to contribute to the future research and teaching activities of the University by devoting time to scholarly inquiry and writing, and/or the improvement of professional skills. Sabbatic leave may also be used by staff members to:</p> <ol style="list-style-type: none"> i. obtain a fresh perspective on an old problem; ii. begin a new and promising line of research and scholarly activity; iii. enhance their knowledge of their subject, discipline, profession or professional practice in order to improve the performance of their academic duties. <p>During a sabbatic leave, the requirement of availability for normal academic duties at the University is waived.</p> <p>1.2 Scope</p> <p>These regulations apply to eligible full-time tenure track or tenured academic staff appointed in accordance with the Regulations Relating to the Employment of Tenure Track and Tenured Academic Staff or the Regulations Relating to the Employment of Librarian Staff.</p> <p>These regulations do not apply to academic staff governed by the Regulations Relating to the Employment of Contract Academic Staff or by a collective agreement.</p>
<p>2 DEFINITIONS</p>	<p>1.3 Definitions</p> <p>For the purpose of these regulations, the following definitions shall apply:</p> <p>1.3.1 "Academic Duties" are as defined in the <i>Regulations Relating to the Employment of Tenure Track and Tenured Academic Staff</i> or the <i>Regulations Relating to the Employment of Librarian Staff</i>.</p> <p>1.3.2 "Academic Term" means the period starting from the 1st of September (Fall term) or starting from 1st January (Winter Term).</p> <p>1.3.3 "Academic Year" means the period from the</p>

Deleted: , as defined in the *Regulations Relating to the Employment of Academic Staff* and the *Regulations Relating to the Employment of Librarian Staff*,

<p>2.1 “Advisor” means an advisor as defined in the Regulations Relating to the Employment of Academic Staff or the Regulations Relating to the Employment of Librarian Staff.</p> <p>2.2 “Chair” means the Chair or director of the academic unit to which a staff member is appointed.</p> <p>2.3 “Credited Service” includes:</p> <p>(i) years of tenured and tenure-track service at the University;</p> <p>(ii) two (2) years’ service in a tenured or tenure-track or equivalent academic or librarian position at another university or universities provided such service did not lead to a sabbatic or equivalent leave at another university;</p> <p>(iii) six (6) months of maternity or extended maternity or extended parental leave; and</p> <p>(iv) six (6) months of short-term disability leave.</p> <p>2.3.1 Except as provided in section 7.1, extra years served prior to a previous sabbatic leave shall not count as Credited Service for a subsequent sabbatic leave.</p> <p>2.3.2 The period of any leave of absence or long-term disability leave shall not count as Credited Service for sabbatic leave consideration.</p> <p>2.4 “staff member” means a tenured or tenure track member of the academic.</p>	<p>1st of September to the 31st of August next following.</p> <p>1.3.4 “Advisor” is as defined in the <i>Regulations Relating to the Employment of Tenure Track and Tenured Academic Staff</i> or the <i>Regulations Relating to the Employment of Librarian Staff</i>.</p> <p>1.3.5 “Chair” means the Chair(s) of the <u>Department(s) or the Director(s) of the Institute(s) or School(s)</u> to which the staff member is appointed.</p> <p>1.3.6 “Department” means departments, institutes, and schools.</p> <p>1.3.7 “Staff member” means a tenured or tenure track member of the academic staff.</p>
<p>3 ELIGIBILITY</p> <p>3.1 To be eligible for sabbatic leave a staff member must:</p> <p>(i) be tenured;</p> <p>(ii) have accumulated, prior to the commencement of a sabbatic leave, six (6) years of Credited Service from the date (a) of his or her appointment, or (b) following his or her return from a previous sabbatic leave;</p> <p>(iii) where appropriate, have filed a Sabbatic Leave Report;</p> <p>(iv) have complied with the requirements of sections 5.1 through 5.3.1; and</p> <p>(v) over the six (6) years immediately preceding his or her application for sabbatic leave, have satisfactorily discharged his or her academic duties as they are defined in the <i>Regulations Relating to the Employment of Academic Staff</i> or the <i>Regulations Relating to the Employment of Librarian Staff</i>.</p>	<p>SECTION 2 – ELIGIBILITY</p> <p>2.1 Criteria</p> <p>2.1.1 To be eligible for sabbatic leave, staff members must <u>meet the following conditions</u>:</p> <ol style="list-style-type: none"> be tenured; have accumulated, prior to the commencement of a sabbatic leave, <u>a minimum of six (6) years of Credited Service</u>; have filed a sabbatic leave report <u>for the previous sabbatic leave</u>; and have satisfactorily discharged their academic duties over the six (6) years immediately preceding the application for sabbatic leave. <p>2.1.2 In the case of tenure track staff members who have not yet received a positive decision on tenure but who satisfy the years of Credited Service, the University may grant sabbatic leave conditional upon acquiring tenure.</p> <p>2.2 Calculation of Credited Service</p> <p>2.2.1 For the purposes of these Regulations, Credited Service shall be calculated as follows:</p> <ol style="list-style-type: none"> <u>a minimum of six (6) years of tenure track or tenured service at the University; or</u> <u>for the initial sabbatic leave request, the six (6) years of credited service may include up to two (2)</u>

Comment [1]: Credited service moved into new Section 2, Eligibility

Deleted: from the date (a) of appointment, or (b) following return from a previous sabbatic leave

Deleted: as they are defined in the *Regulations Relating to the Employment of Academic Staff* or the *Regulations Relating to the Employment of Librarian Staff*

	<p>years of service in a tenure track or tenured academic or librarian position at another university <u>immediately prior to joining McGill</u>, provided such service did not lead to a sabbatic or equivalent leave at <u>the prior</u> university, or</p> <p>iii. <u>a minimum of six (6) years of tenure-track/tenured service at the University, including up to six (6) months of maternity leave, extended parental leave, or short-term disability leave.</u></p> <p>2.2.2 Except as <u>expressly</u> provided in <u>these regulations</u>, <u>credited service is set at zero after each sabbatic leave</u>. Extra <u>periods</u> served prior to a sabbatic leave shall not count towards Credited Service for a subsequent sabbatic leave.</p> <p>2.2.3 For a staff member granted two six-month sabbatic leaves, the period of Credited Service for the next sabbatic leave shall begin six (6) months following the termination of the first six-month leave.</p> <p>2.2.4 The period of any leave of absence or long-term disability leave shall not count towards Credited Service for sabbatic leave consideration.</p>
<p>4. LENGTH OF SABBATIC LEAVES</p> <p>4.1 Sabbatic leaves are normally granted for periods of either: (i) twelve months which period shall normally commence either on January 1 or September 1; or (ii) two (2) six (6) months in different academic years which periods shall normally commence either on January 1 or July 1.</p> <p>4.2 For a staff member granted two six(6)-month sabbatic leaves, the periods of Credited Service for the next sabbatic leave shall begin six (6) months following the termination of the first six(6)-month leave.</p> <p>4.3 If sabbatic leave is granted for less than a total of twelve (12) months the remaining months shall not be added to a future sabbatic leave.</p>	<p>SECTION 3 LENGTH OF SABBATIC LEAVES</p> <p>3.1 Sabbatic leaves <u>shall be</u> granted for either: i. one period of twelve (12) months, which period shall normally commence either on January 1 or September 1; or ii. two (2) <u>periods of</u> six (6) months in different academic years, which periods shall normally commence either on January 1 or July 1.</p> <p>3.2 If sabbatic leave is granted for less than a total of twelve (12) months the remaining months shall not be added, <u>or carried forward</u>, to a future sabbatic leave.</p> <p>3.3 Notwithstanding section 3.1, professional development leave for periods of less than six (6) months may be granted to a staff member by the Chair or Dean. <u>Leaves which exceed one month in total must be approved by the Provost.</u></p>
<p>Professional Development Leave</p> <p>4.4 Notwithstanding section 4.1, professional development leave for periods of less than six (6) months may be granted a staff member by his or her chair, dean or the Director or Dean of Libraries.</p> <p>4.5 Where, during the six (6) years immediately preceding a sabbatic leave application, a staff member has been granted one or more professional development leaves which exceed in total twenty five (25) working days, the period of the professional development leave shall be deducted from the period of sabbatic leave for which the staff member may apply.</p>	<p>3.4 Where, during the six (6) years immediately preceding a sabbatic leave application, a staff member has been granted one or more professional development leaves which exceed <u>one month</u> in total, the period of the professional development leave shall be deducted from the period of sabbatic leave for which the staff member may apply.</p>

<p>5. SABBATIC LEAVE APPLICATIONS</p> <p>5.1 A staff member shall apply for a sabbatic leave on the Sabbatic Leave Application Form approved by the Standing Committee on Sabbatic Leaves and available from the Office of the Provost.</p> <p>5.1.1 A staff member who wishes to take two six(6)-month sabbatic leaves in non-consecutive academic years shall submit a separate application for each leave.</p> <p>5.2 A staff member shall provide a concise sabbatic plan that clearly establishes that the leave will be used for activities that conform to the purpose of sabbatic leaves as set out in section 1.</p> <p>5.2.1 In particular the sabbatic plan shall address: (i) the academic goals or objectives of the work planned for the sabbatic leave; (ii) the completed preparatory work for the work planned for the sabbatic leave, if any; (iii) how the academic goals and objectives are to be achieved during the sabbatic leave; (iv) the significance of the work planned and its relevance to the staff member's academic duties, his or her academic unit, and/or the University; (v) the anticipated outcomes of the proposed sabbatic leave.</p> <p>5.3.1 By October 1 the staff member shall forward to his or her Chair, dean of a faculty without departments or the Director or Dean of Libraries, as appropriate, a duly completed Sabbatic Leave Application Form for the following academic year together with: (i) a current curriculum vitae; (ii) a list of publications, if not included in the curriculum vitae; (iii) a statement of the location(s) at which the sabbatic leave is to be taken; (iv) letter(s) of invitation from the institution(s) the staff member plans to visit, if appropriate; and (v) a copy of the report submitted following the preceding sabbatic leave, if appropriate.</p> <p>5.3.2 By October 20 the Chair shall forward the application, along with his or her recommendation supported by substantive written reasons, to the dean. If a deferment or denial of the application is to be recommended, the Chair shall first consult with the staff member.</p>	<p>SECTION 4 – PROCEDURES</p> <p>4.1 APPLICATION FORMS</p> <p>4.1.1 A staff member shall apply for a sabbatic leave by completing the Sabbatic Leave Application Form available from the <u>Academic Personnel Office</u>.</p> <p>4.1.2 A staff member applying for two (2) six-month sabbatic leaves in consecutive Academic Years shall submit one application form.</p> <p>4.1.3 A staff member <u>applying for</u> two (2) six-month sabbatic leaves in non-consecutive Academic Years shall submit a separate application for each leave.</p> <p>4.1.4 Where a staff member is appointed in more than one department or faculty, the staff member's Sabbatic Leave Application shall be submitted by the staff member to all relevant Chairs and forwarded to the appropriate Dean or Deans.</p> <p>4.2 SABBATIC PLAN AND OTHER DOCUMENTATION</p> <p>4.2.1 A staff member shall provide a clear and concise sabbatic plan that outlines the scholarly activities planned for the sabbatic leave and how the leave will conform to the purpose of sabbatic leaves as set out in section 1.</p> <p>In particular the sabbatic plan shall address:</p> <ol style="list-style-type: none"> the academic goals or objectives planned for the sabbatic leave; the significance of the work planned and its relevance to the staff member's <u>future</u> academic duties, to the academic unit and/or the University; and the anticipated outcomes of the proposed sabbatic leave. <p>4.2.2 The staff member shall also submit:</p> <ol style="list-style-type: none"> a current curriculum vitae, <u>including list of publications</u>; a statement of the location(s) where the sabbatic leave is to be taken; letter(s) of invitation from the institution(s) the staff member plans to visit, if relevant; a copy of the Sabbatic Leave Report submitted following the preceding sabbatic leave. <p>4.3 DEADLINES</p> <p>4.3.1 By October 1 the staff member shall forward to the Chair, a duly completed sabbatic leave application Form <u>requesting leave</u> for the following academic year.</p> <p>4.3.2 By October 20 the Chair shall forward the staff member's sabbatic leave application to the Dean, along with the Chair's <u>written</u> recommendation.</p>
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Comment [2]: There is overlap here between current (i), (iii) and (v), so (iii) has been removed.

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<p>5.3.3 By November 15 the dean of the faculty or the Director or Dean of Libraries shall forward the application, together with his or her recommendation supported by substantive written reasons, to the Provost. If a deferment or denial of the staff member's application is to be recommended, the dean of the faculty or the Director or Dean of Libraries shall first consult with the Chair, where appropriate, and the staff member.</p> <p>5.4 Where a staff member is appointed in more than one department or faculty without departments, the application for sabbatic leave shall be submitted by the staff member to all relevant Chairs and forwarded to the appropriate dean or deans and, where appropriate, the Director or Dean of Libraries who shall comply with the requirements of sections 5.3.1 to 5.3.3.</p> <p>5.5.1 The Provost and the Vice-Principal (Research and International Relations) or delegate, shall give careful consideration to each application according to the criteria set out in these regulations.</p> <p>5.5.2 By January 7 of the year following submission of an application the Provost and Vice-Principal (Research and International Relations) or delegate shall notify the staff member if they are tending to a negative decision with respect to that staff member's application, so that additional consultations may occur with the staff member, his or her Chair and dean, or the Director or Dean of Libraries, as appropriate.</p> <p>5.5.3 By January 31 of the year following submission of the application the Provost and Vice-Principal (Research and International Relations) or delegate shall notify the staff member of their final decision.</p> <p>5.5.4 In the case of a negative decision the Provost and Vice-Principal (Research and International Relations) or delegate shall provide substantive written reasons consistent with these regulations.</p> <p>5.6 A staff member consulted in accordance with sections 5.3.2, 5.3.3 and 5.5.2 shall have the right to be accompanied by an Advisor.</p>	<p>4.3.3 If a deferment or denial of the application is to be recommended, the Chair shall first consult with the staff member.</p> <p>4.3.4 By November 15, the Dean shall forward to the Provost the staff member's sabbatic leave application, together with the Chair's and Dean's <u>written</u> recommendations.</p> <p>4.3.5 If a deferment or denial of the staff member's application is to be recommended, the Dean shall first consult with the Chair, where appropriate, and the staff member.</p> <p>4.3.6 By January 15 the Provost shall notify the staff member if tending to a negative decision with respect to that staff member's application, so that additional consultations may occur with the staff member, the Chair and the Dean.</p> <p>4.3.7 By January 31 following submission of the application, the Provost shall notify the staff member of the final decision.</p> <p>4.3.8 In the case of a negative decision, the Provost shall provide substantive written reasons consistent with these regulations.</p> <p>4.3.9 A staff member consulted in accordance with these regulations shall have the right to be accompanied by an Advisor.</p>
<p>6 BASIS FOR GRANTING SABBATIC LEAVES</p> <p>6.1 Sabbatic leaves are granted on a discretionary basis in accordance with the academic objectives and financial exigencies of the University to staff members who have (i) met the criteria of eligibility in section 3.1; and (ii) complied with the requirements of section 5.3.1.</p> <p>6.2 The sabbatic leave schedule for an academic unit shall protect its undergraduate and graduate teaching programs and its graduate and postdoctoral supervision practices. The schedule shall provide for an equitable distribution of academic duties amongst other staff in the unit to replace the normal activities of staff members on sabbatic leave. Each staff member's application shall be evaluated in such</p>	<p>SECTION 5 GRANTING OF SABBATIC LEAVES</p> <p>5.1 Sabbatic leaves are granted on a discretionary basis in accordance with the academic objectives and financial exigencies of the University. The Provost shall give careful consideration to each application according to the criteria set out in these regulations.</p> <p>5.2 Notwithstanding section 5.1, after six (6) years of Credited Service a sabbatic leave shall not normally be denied or deferred unless: (i) a staff member has not fulfilled one or more of the <u>eligibility</u> requirements; or (ii) the teaching, research, or service function of the staff</p>

Comment [3]: Current 5.4 now in proposed section 4.1.4

Deleted: and the Vice-Principal (Research and International Relations) or delegate,

Comment [4]: Having VP(RIR) involved adds an unnecessary bureaucratic step and slows down the application process. Deleted throughout the proposed version without further indication from here on.

Comment [5]: Current 6.2 now in proposed 6.1.1

<p>framework and staff members shall cooperate in the process.</p> <p>6.3 Notwithstanding section 6.1, after six (6) years of Credited Service a sabbatic leave shall not normally be deferred or denied unless:</p> <p>(i) a staff member has not fulfilled one or more of the requirements of sections 3.1 and 5.3.1; or</p> <p>(ii) the teaching, research, or service function of the staff member's unit will be severely disrupted by the proposed leave.</p>	<p>member's unit will be severely disrupted by the proposed leave.</p> <p>5.3 As a sabbatic leave is viewed as an investment by the University in the future of the staff member, a sabbatic leave shall not be approved in conjunction with a retirement or phased retirement.</p>
<p>7 DEFERMENT OF SABBATIC LEAVE</p> <p>7.1 In the event that a staff member who has met the requirements of sections 3.1 and 5.3.1, is requested to defer a sabbatic leave because:</p> <p>(i) the teaching, research, or service function of the staff member's academic or library unit will be severely disrupted;</p> <p>(ii) the Chair and/or dean, or Director or Dean of Libraries, have failed to provide an adequate sabbatic leave schedule for the unit; or</p> <p>(iii) of financial or other administrative reasons; the period of the deferral shall be counted as Credited Service towards the next sabbatic leave and the deferral shall be accompanied by a written commitment for sabbatic leave at a future specified time.</p> <p>7.2 A staff member, once granted sabbatic leave, may request a deferral of that leave only if the staff member gives his or her Chair and dean, or the Director or Dean of Libraries, as appropriate, three (3) months notice of the staff member's wish to defer prior to the commencement of the leave. Only in truly exceptional circumstances will a deferral request be considered with shorter notice.</p>	<p>SECTION 6 DEFERMENT OF SABBATIC LEAVE</p> <p>6.1 SCHEDULING</p> <p>6.1.1 The sabbatic leave schedule for an academic unit shall protect its undergraduate and graduate teaching programs and its graduate and postdoctoral supervision practices. The schedule shall provide for an equitable distribution of academic duties amongst other staff in the unit to replace the normal activities of staff members on sabbatic leave. Each staff member's application shall be evaluated in such a framework and staff members shall cooperate in the process.</p> <p>6.2 DEFERMENT AT THE UNIVERSITY'S REQUEST</p> <p>6.2.1 A staff member who has met the <u>eligibility requirements for leave may be</u> requested to defer a sabbatic leave or application for leave because:</p> <ol style="list-style-type: none"> the teaching, research, or service function of the staff member's unit will be severely disrupted; the Chair and/or Dean <u>are unable to</u> provide an adequate sabbatic leave schedule for the unit; or of financial or other administrative reasons. <p>6.2.2 The deferral shall be duly documented and the period of the deferral shall be counted as Credited Service towards the next sabbatic leave. Where a sabbatic leave has already been approved, the deferral shall be accompanied by a written commitment for sabbatic leave at a future <u>date</u>.</p> <p>6.3 DEFERMENT AT THE STAFF MEMBER'S REQUEST</p> <p>6.3.1 A staff member, once approved for sabbatic leave, may, <u>for good and valid reasons</u>, request a deferral of that leave by giving the Chair, Dean, and Provost at least three (3) months <u>written</u> notice prior to the commencement of the leave. Only in truly exceptional circumstances will a deferral request be considered with shorter notice.</p> <p>6.3.2 The deferral shall be duly documented. The period of the deferral shall not be counted as Credited Service towards the next sabbatic leave.</p>

<p>7.3 Subject to section 7.2, short or long term disability leave taken by a staff member during the period of a sabbatic leave shall not give rise to a right to an extension, deferral or postponement of the sabbatic leave.</p>	<p>6.4 OTHER CONDITIONS</p> <p>6.4.1 Short or long term disability leave taken by a staff member during the period of a sabbatic leave shall not give rise to a right to an extension, deferral or postponement of the sabbatic leave.</p>
<p>8 PAYMENT</p> <p>8.1 The University shall pay to staff members on sabbatic leave their full salary as well as the University's normal share of fringe benefits.</p> <p>8.2 A staff member on sabbatic leave shall be eligible for all annual salary increments.</p> <p>8.3 To the extent that income tax regulations allow, a staff member may request that a portion of his or her salary be made available as a research grant during the period of sabbatic leave. In this case the staff member shall provide the University with a description of the research project and activities to be funded by the research grant.</p> <p>It is understood that the University makes no representation as to the legitimacy of any deductions that the staff member may seek to claim as expenses in carrying out the work, and it is entirely the staff member's responsibility to comply with all applicable income tax requirements in respect of any such deductions.</p>	<p>SECTION 7 – PAYMENT</p> <p>7.1 SALARY AND BENEFITS</p> <p>The University shall pay staff members on sabbatic leave their full salary as well as the University's normal share of the <u>employee</u> benefits.</p> <p>7.2 APPLICATION OF SALARY POLICY</p> <p>During the sabbatic leave, staff members shall be eligible for annual salary increments in accordance with University salary policy as set from time to time.</p> <p>7.3 RESEARCH GRANT</p> <p>7.3.1 To the extent that income tax regulations allow, staff members may request that a portion of their salary be made available as a research grant <u>rather than salary</u> during the period of sabbatic leave. In this case, the staff member's salary shall be reduced by the amount of the research grant and all contributory costs of benefits, paid by the staff member and the University, shall be pro-rated accordingly.</p> <p>7.3.2 The staff member shall make a written request and provide the University with a description of the research project and activities to be funded by the research grant.</p> <p>7.3.3 It is understood that the University makes no representation as to legitimacy of any deductions that the staff member may seek to claim as expenses in carrying out the work. It is entirely the staff member's responsibility to make the necessary disclosures and to comply with all applicable income tax requirements in respect of any such deductions.</p> <p>7.4 OTHER SOURCES OF INCOME</p> <p>7.4.1 A staff member on sabbatic leave may not hold employment with another employer.</p> <p>7.4.2 Consistent with the foregoing, a sabbatic leave is not intended to allow a staff member to assume a salaried position elsewhere. A staff member wishing to do so shall apply for a leave of absence without pay.</p> <p>7.4.3 Staff members shall disclose in sufficient detail</p>

Comment [6]: These provisions have been in effect for many years but were not explicit.

	<p>on the Sabbatic Leave Application any remuneration to be received while on sabbatical (such as honoraria, professional fees, cost of living allowances, fellowships and research stipends) and shall report to their Dean and the Provost all income received during the sabbatic leave which was not previously disclosed.</p>
<p>9 OBLIGATIONS ON COMPLETION OF SABBATIC LEAVES</p> <p>9.1 Subject to section 9.1.1, a staff member, on applying for sabbatic leave, shall give a signed statement accepting his or her obligation to return to the University following the sabbatic leave and agreeing to serve the University for a period of one academic year.</p> <p>9.1.1 In the case of six-month sabbatics, the corresponding period of service shall be a minimum of six months which shall encompass at least one full academic term.</p> <p>9.2 Within six months of return from sabbatic leave, the staff member shall submit to his or her Chair, dean of a faculty without departments or the Director or Dean of Libraries, as appropriate, and the Provost a Sabbatic Leave Report. This report shall describe the sabbatic experience in terms of its fulfillment of the sabbatic leave plan.</p> <p>If two six-month leaves are taken in non-consecutive academic years, the staff member shall submit a report following each six-month sabbatic leave.</p>	<p>SECTION 8 - OBLIGATIONS ON COMPLETION OF SABBATIC LEAVES</p> <p>8.1 RETURN TO SERVICE</p> <p>8.1.1 Immediately following a period of sabbatic leave, the staff member shall return to active service with the University, exercising full academic duties. Where the staff member was granted a 12 month sabbatic leave, the staff member shall provide a period of service of one year, encompassing at least two full academic terms. Where the staff member was granted a six month sabbatic leave, the corresponding period of service shall encompass at least one full academic term.</p> <p>8.1.2 A staff member who does not return from sabbatic leave at the end of the approved period shall be deemed to have resigned from the University. Within three (3) calendar months of the end of the sabbatic period, the staff member shall reimburse the University in full for the cost of salary and benefits received during the sabbatic leave.</p> <p>8.2 SABBATIC LEAVE REPORT</p> <p>8.2.1 Within six (6) months of return from sabbatic leave, the staff member shall submit a Sabbatic Leave Report to the Chair, <u>with a copy to the Dean</u> and the Provost. This report shall describe the sabbatic experience in terms of its fulfillment of the Sabbatic Plan.</p> <p>8.2.2 If two six-month leaves are taken in non-consecutive academic years, the staff member shall submit a report following each six-month sabbatic leave.</p>
<p>10 SUPPORT FOR SMALL FACULTIES AND FOR UNIVERSITY LIBRARIES</p> <p>10.1 The University shall provide an appropriate sabbatic leave replacement fund of not less than \$100,000 per annum to assist libraries and small faculties. This fund will be administered by the Provost.</p>	<p>REMOVED</p>
<p>11 STANDING COMMITTEE ON SABBATIC LEAVES</p> <p>11.1 A Standing Committee on Sabbatic Leaves, composed of two persons named by the McGill Association of</p>	

Comment [7]: Does not relate to the rights and responsibilities of staff members

Comment [8]: Current 11 split and moved down to proposed sections 10 and 12.

<p>University Teachers and two named by the Principal, with a Chair selected by the named members, is responsible for reporting annually to Senate on the administration of the present regulations.</p>	
<p>12 LEAVES FOR ACADEMIC ADMINISTRATORS</p> <p>12.1 Notwithstanding any other provisions of these regulations, a staff member who accepts to serve as a senior academic administrator shall, at the time of appointment, determine with the Provost or, where appropriate, the Principal, his or her entitlement to leave.</p>	<p>SECTION 9 LEAVES FOR ACADEMIC ADMINISTRATORS</p> <p>9.1 Notwithstanding any other provisions of these regulations, a staff member who accepts to serve as a senior academic administrator shall, at the time of appointment, determine with the Provost or, where appropriate, the Principal, <u>arrangements</u> for leave and/or credited service <u>relating to the period of the administrative appointment</u>.</p>
	<p>SECTION 10 ANNUAL REPORT TO SENATE</p> <p>10.1 The Provost shall report annually to Senate and the Board of Governors on the number of sabbatic leaves that have been applied for and approved and the numbers of staff members currently on sabbatic leave.</p>
<p>13 APPLICABILITY OF OTHER UNIVERSITY REGULATIONS</p> <p>13.1 Except as provided in section 1, staff members on sabbatic leave are subject to, and shall comply with all University regulations, policies and guidelines as may exist from time to time.</p>	<p>SECTION 11 APPLICABILITY OF OTHER UNIVERSITY POLICIES</p> <p>11.1 Staff members on sabbatic leave remain employees of the University. Except as provided in Section 1, staff members are subject to, and shall comply with, all University regulations, policies and guidelines as may exist from time to time.</p>
	<p>SECTION 12 STANDING COMMITTEE ON SABBATIC LEAVES</p> <p>12.1 A Standing Committee on Sabbatic Leaves, composed of two persons named by the McGill Association of University Teachers and two named by the Principal, with a Chair selected by the named members, is responsible for the administration of the present regulations.</p>

Comment [9]: Makes this consistent with the LoA Regulations, as well as current practice.

Regulations on Leaves of Absence for Tenure Track and Tenured Academic Staff

Current	Proposed
<p>1 DEFINITIONS</p> <p>1.1 "Staff member" in these regulations shall mean a member of the tenured or tenure track academic staff.</p> <p>1.2 The requirement of availability of a staff member for normal academic duties at the University, as defined in the "Regulations Relating to the Employment of Academic Staff" and in the "Regulations Relating to the Employment of Librarian Staff", is waived during a leave of absence.</p> <p>1.3 In these regulations, the "Chair" (of a department) shall be deemed to refer to the Director of a School, when the request for a leave is from a staff member in a School.</p> <p>1.4 In these regulations, where a staff member has been appointed to one of more departments, schools and/or faculties, the terms "Chair," "Dean" and "administrative librarian" shall include the Chairs, Deans and administrative librarians of each department, faculty or library in which the staff member holds appointment.</p>	<p>SECTION 1 - PREAMBLE</p> <p>1.1 A Leave of Absence is an authorized period of leave without pay requested by a staff member and granted by the University.</p> <p>1.2 Scope</p> <p>These regulations apply to eligible full-time tenure track or tenured academic staff appointed in accordance with the <i>Regulations Relating to the Employment of Tenure Track and Tenured Academic Staff</i> or the <i>Regulations Relating to the Employment of Librarian Staff</i>.</p> <p>These regulations do not apply to academic staff governed by the <i>Regulations Relating to the Employment of Contract Academic Staff</i> or by a collective agreement.</p> <p>1.3 Definitions</p> <p>For the purpose of these regulations, the following definitions shall apply:</p> <p>1.3.1 "Academic Duties" are as defined in the <i>Regulations Relating to the Employment of Tenure Track and Tenured Academic Staff</i> or the <i>Regulations Relating to the Employment of Librarian Staff</i>.</p> <p>1.3.2 "Chair" means the Chair(s) of the Department(s) or the Director(s) of the Institute(s) or School(s) to which the staff member is appointed.</p> <p>1.3.3 "Department" means departments, institutes, and schools.</p> <p>1.3.4 "Staff member" means a tenured or tenure track member of the academic staff.</p>
<p>2 LENGTH OF LEAVE</p> <p>2. Subject to Articles 4.2 and 8 of these regulations, a leave of absence shall be limited to a maximum of two consecutive years. A sabbatical taken in conjunction with a leave of absence shall be deemed to be part of the two-year period.</p>	<p>2. ACADEMIC DUTIES</p> <p>2.1 During a leave of absence, the requirement of availability of a staff member for normal academic duties at the University, is waived unless expressly addressed as a condition of the leave.</p> <p>3. LENGTH OF LEAVE</p> <p>3.1 Except as otherwise provided for in these regulations, a leave of absence shall be limited to a maximum of two consecutive years.</p> <p>3.2 A sabbatical taken in conjunction with a leave of absence shall be counted as part of the two-year period.</p> <p>3.3 A maternity leave, parental leave or short-term disability leave taken in conjunction with a leave of</p>

Comment [1]: Current 1.2 is not a definition. Has been moved into proposed section 2.

Comment [2]: Current 1.4 covered by proposed 1.3.2 and 4.2, and subsequently.

Deleted: , as defined in the "Regulations Relating to the Employment of Tenure Track and Tenured Academic Staff" and in the "Regulations Relating to the Employment of Librarian Staff"

<p>3 APPLICATION FOR LEAVE OF ABSENCE</p> <p>3.1 A staff member shall submit a request for a leave of absence to the Chair and the Dean, or administrative librarian and Director or Dean of Libraries, as the case may be, using the forms required for that purpose, at least 90 calendar days before the proposed commencement of the leave.</p> <p>3.2 If a staff member currently on a leave of absence or a sabbatical year wishes to take a leave of absence for a second or subsequent year, the staff member shall submit a request to the Chair or Dean, or administrative librarian or Director or Dean of Libraries, as the case may be, using the forms required for that purpose, at least 90 calendar days before the end of the current leave.</p> <p>4 DECISIONS ON LEAVES OF ABSENCE</p> <p>4.1 Subject to Section 8, a request for an initial leave of absence for a period of two years or less, or for a leave of absence following a sabbatical year, may be granted by the Provost, after considering the recommendations of the Chair, the Dean, or administrative librarian and Director or Dean of Libraries, and the Vice-Principal (Research and International Relations) or delegate.</p> <p>4.2 Subject to Sections 8.4 and 8.6, a request for an extension of a leave of absence must be approved by the Principal, after considering the recommendations of the Chair, Dean, or administrative librarian and Director or Dean of Libraries, Vice-Principal (Research International Relations) or delegate and the Provost. Such a request will be granted only in exceptional circumstances.</p> <p>4.3 Subject to Section 8, the decision to grant a request for a leave of absence is at the discretion of the Provost or Principal, in accordance with Articles 4.1 and 4.2 above.</p> <p>4.4 In deciding whether to grant a leave of absence or an extension of a leave of absence, the Provost or Principal, as the case may be, shall consider: (i) the staff member's academic development; and (ii) how the staff member's responsibilities, including but not limited to responsibility for teaching, research and administration, can be fulfilled during the staff member's absence.</p> <p>Notwithstanding the above, the Provost or Principal, as the case may be, may exceptionally grant a leaves of absence, or an extension of a leave of absence, on compassionate grounds.</p>	<p>absence shall be counted as part of the two-year period.</p> <p>4 APPLICATION FOR LEAVE OF ABSENCE</p> <p>4.1 A staff member shall submit a request for a leave of absence to the Chair and the Dean, using the form <u>provided</u> for that purpose, at least 90 calendar days before the proposed commencement of the leave.</p> <p>4.2 Where a staff member is appointed in more than one department or faculty, the leave application shall be submitted by the staff member to all relevant Chairs and Deans.</p> <p>4.3 A staff member shall fully disclose the purpose of the leave, the proposed start and end dates, and arrangements for supervision of graduate students.</p> <p>4.4 A staff member currently on leave, who wishes to take a leave of absence for a subsequent year shall submit a request to the Chair and Dean, using the form <u>provided</u> for that purpose, at least 90 calendar days before the end of the current leave.</p> <p>5 APPROVAL OF LEAVES OF ABSENCE</p> <p>5.1 A request for leave of absence may be granted by the Provost, after considering the recommendations of the Chair and Dean.</p> <p>5.2 A request for an extension of a leave of absence <u>beyond two years</u> must be approved by the Principal, after considering the recommendations of the Chair, the Dean, and the Provost. Such a request will be granted only in exceptional circumstances.</p> <p>5.3 The decision to grant a request for a leave of absence is at the discretion of the Provost or Principal.</p> <p>5.4 In deciding whether to grant a leave of absence or an extension of a leave of absence, the Provost or Principal, as the case may be, shall consider <u>amongst other things</u>: (i) the staff member's academic development; and (ii) how the staff member's responsibilities, including but not limited to teaching, research and administration, can be fulfilled during the staff member's absence; (iii) the timing of the request and the staffing levels within the unit.</p> <p>5.4.1 Notwithstanding the above, the Provost or Principal, as the case may be, may exceptionally grant a leave of absence, or an extension of a leave of absence, on compassionate grounds.</p> <p>5.5 The Provost or Principal may set such conditions as deemed appropriate.</p> <p>6 SALARY AND BENEFITS</p> <p>6.1 A staff member shall receive no salary from the University during a leave of absence.</p>
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Comment [4]: "or administrative librarian and Director or Dean of Libraries, as the case may be" deleted throughout the proposed version without further indication from here on.

Deleted: of absence or a sabbatical year

Deleted: for a period of two years or less, or for a leave of absence following a sabbatical year,

Comment [5]: Having VP(RIR) involved adds an unnecessary bureaucratic step and slows down the application process. Deleted throughout the proposed version without further indication from here on.

Deleted: , and the Vice-Principal (Research and International Relations) or delegate

<p>5 SALARY AND BENEFITS</p> <p>5.1 A staff member shall not be paid during a leave of absence.</p> <p>5.2 During the leave of absence, the staff member may elect to continue employee benefits coverage by paying the full amount of the University's and the staff member's costs.</p> <p>5.3 Upon return from a leave of absence, the staff member's salary shall be adjusted to reflect any across-the-board salary increases resulting from salary policy. The period of leave of absence shall not be considered for merit salary adjustment, except in extraordinary circumstances.</p> <p>6 TENURE AND SABBATIC LEAVE</p> <p>6.1 The staff member shall elect, as provided in the "Regulations Relating to the Employment of Academic Staff" or the "Regulations Relating to the Employment of Librarian Staff" whether to include or exclude as periods of service for tenure consideration periods of leave of absence.</p> <p>6.2 Leaves of absence shall not count as credited service towards sabbatic leave, except in extraordinary circumstances.</p> <p>7 SECONDMENT LEAVE</p> <p>7.1 A secondment leave is a special type of leave of absence and is subject to an agreement between the University and another institution.</p> <p>7.2 The specific terms of a secondment leave shall be determined by the Dean or Director of Libraries and approved by the Provost in accordance with applicable regulations and shall be set out in an agreement between the University and the receiving institution.</p> <p>8 POLITICAL CANDIDACY</p> <p>8.1 A leave of absence for political purposes is a special type of leave of absence. The University recognizes that members of the academic community can make significant contributions as elected politicians. Thus, staff members should be as free as the members of any other profession to enter public life.</p> <p>8.2 A staff member seeking office as a candidate in a provincial or federal election, on request in writing to his or her Chair, Dean, administrative librarian and Director or Dean of Libraries, as the case may be, and the Provost, shall be granted a leave of absence without pay during the official campaign period.</p>	<p>6.2 The staff member may elect to continue employee benefits coverage <u>during the leave of absence</u> by paying the full amount of <u>both</u> the University's and the staff member's <u>contributions</u>. Such arrangement shall be made by the staff member at the beginning of the approved leave by contacting Human Resources.</p> <p>6.3 Upon return from a leave of absence, the staff member's salary shall be reinstated and, as required, shall be adjusted to reflect any across-the-board salary increases resulting from salary policy. The period of leave of absence shall not be considered for merit salary adjustment.</p> <p>7 PERIODS OF SERVICE FOR TENURE AND SABBATIC LEAVE</p> <p>7.1 The staff member shall elect, as provided in the <i>Regulations Relating to the Employment of Tenure Track and Tenured Academic Staff</i> and the <i>Regulations Relating to the Employment of Librarian Staff</i>, whether to include or exclude periods of leaves of absence as periods of service for tenure consideration.</p> <p>7.2 Leaves of absence shall not count as credited service towards sabbatic leave.</p> <p>8 SECONDMENT LEAVE</p> <p>8.1 A secondment leave is a special type of leave of absence that is subject to an agreement between the University and <u>a receiving</u> institution.</p> <p>8.2 The specific terms of a secondment leave shall be determined by the Dean and approved by the Provost in accordance with <u>such guidelines and regulations as may be established from time to time by the University and with the requests of</u> the receiving institution.</p> <p>8.3 The specific terms of a secondment leave shall be set out in an agreement between the University and the receiving institution.</p> <p>9 POLITICAL CANDIDACY</p> <p>9.1 A leave of absence for political purposes is a special type of leave of absence. The University recognizes that members of the academic community can make significant contributions as elected politicians. Thus, staff members should be as free as the members of any other profession to enter public life.</p> <p>9.2 A staff member seeking office as a candidate in a provincial or federal election, on request in writing to the Chair, Dean, and the Provost, shall be granted a leave of absence without pay during the official campaign period.</p> <p>9.3 A staff member who is elected shall be granted a leave of absence without pay until the expiry of the staff member's appointment with the University or for a</p>
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Deleted: . except in extraordinary circumstances

Comment [6]: Brings this into line with the Sabbatic Leave Regs.

Deleted: except in extraordinary circumstances.

<p>8.3 If a staff member is elected he or she shall be also granted a leave of absence without pay (i) until the expiry of the staff member's appointment with the University, if the staff member is a staff member without tenure, or (ii) for a maximum duration of six years, if the staff member is a staff member with tenure.</p>	<p>maximum duration of five years, whichever comes first.</p>
<p>8.4 If, three months prior to the expiration of the leave of absence provided for in section 8.3, the staff member gives written notice to the Chair, the Dean, administrative librarian and the Director or Dean of Libraries, as the case may be, and the Provost of his or her intention to return to the University on the expiration of his or her current term of office, the staff member's leave of absence shall be extended until the expiry of that term of office.</p>	<p>9.4 If, three months prior to the expiration of the leave of absence provided for in section 9.3, the staff member gives written notice to the Chair, Dean, and Provost of his or her intention to return to the University on the expiration of his or her current term of office, the staff member's leave of absence shall be extended until the expiry of that term of office.</p> <p>9.5 No extension other than that provided for in section 9.4 shall be granted to a staff member who is absent from the University on a leave of absence for political purposes.</p>
<p>8.5 If the staff member: (i) fails to give notice as specified in section 8.4, or (ii) having given notice as specified in section 8.4, fails to resume his or her position with the University on the expiry of his or her leave of absence or extension thereof, the staff member's appointment will terminate.</p>	<p>10 PUBLIC OFFICE</p> <p>10.1 The University recognizes that staff members can make significant contributions in the service of the community with appointments to public office or by temporary assignment to public bodies or agencies, such as federal or provincial governments or international agencies and organizations of high repute.</p>
<p>8.6 Notwithstanding Sections 4.2 through 4.4, no extension other than that provided for in section 8.4 shall be granted a staff member who is absent from the University on a leave of absence for political purposes.</p>	<p>10.2 A staff member who is appointed to public office may be granted a leave of absence without pay until the expiry of the staff member's appointment with the University or for a maximum duration of five years, whichever comes first.</p>
<p>9 PUBLIC OFFICE</p> <p>9.1 The University recognizes that members of the academic community can make significant contributions in the service of the community with appointments to public office or by temporary assignment to public bodies or agencies, such as federal or provincial governments or international agencies and organizations of high repute.</p>	<p>11 RETURN FROM LEAVE OF ABSENCE</p> <p>11.1 A staff member who does not return from a leave of absence at the end of the approved period shall be deemed to have resigned from the University.</p>
<p>9.2 If a staff member is appointed to public office, he or she may be granted a leave of absence without pay until the expiry of the staff member's appointment with the University or for a maximum duration of five years, whichever comes first.</p>	<p>11.2 A staff member may return to the University prior to the expiration of the approved leave of absence subject to express prior approval from the Provost.</p> <p>11.2.1 The staff member shall submit a written request to the Provost, with a copy to the Chair and Dean. The request shall be submitted no later than three (3) months prior to the proposed date of return to work.</p> <p>11.2.2 The Provost shall consult with the Chair and Dean and confirm the date of return, based on the academic objectives and financial exigencies of the University.</p>
<p>10 RETURN FROM LEAVE OF ABSENCE</p> <p>10. A staff member who does not return from the leave of absence at the end of the approved period shall be deemed to have resigned from the University.</p>	<p>12 ANNUAL REPORT TO SENATE</p> <p>12.1 The Provost shall report <u>annually</u> to Senate and the Board of Governors <u>on the number of</u> leaves of absence that have been applied for and approved and the number of staff members currently on leave of absence, and the length of each leave.</p>
<p>11 REPORTING</p> <p>11. The Provost shall report once each year to the Senate and the Board of Governors the leaves of absence that have been applied for and approved each year, and the number of staff members currently on leave of absence, and the length of each leave of absence.</p>	

Comment [7]: Wording replaces current 8.3 and is made consistent with current 9.2, proposed 10.2.

Comment [3]: Current 8.5 involved duplication. It is already covered in current 10 and proposed 11.1.

Comment [8]: Current regulations do not make provision for an earlier return from a LoA.