

MONTANA BOARD OF REGENTS OF HIGHER EDUCATION
Policy and Procedures Manual

SUBJECT: COMPENSATION AND EMPLOYEE BENEFITS

Policy 801.1 – Sabbatical Assignment

Adopted: November 27, 1967; Revised November 16, 2007

Attorney General's Opinion

Section 75-6213, R.C.M. 1947 (now codified at 19-20-403 M.C.A.), does not prohibit a faculty member from accruing creditable service and receiving the employer contribution for retirement benefits during the performance of a sabbatical program. Vol. 37, Opinions of the Attorney General, Opinion No. 80, October 17, 1977.

I. Board Policy

A. Faculty, administrative or professional staff members in the Montana University System shall be eligible for their first sabbatical assignment after seven years of service in the System. Those employees shall be eligible for subsequent sabbaticals throughout their career, provided they have accrued seven additional years of service in the System between each sabbatical. The year in which the last sabbatical occurred shall be included in determining the seven years of additional service. Service while on sabbatical assignment shall be creditable service for all purposes to the same extent as a person's service while on regular assignment.

B. Sabbaticals are subject to budget limitations that may exist at any campus of the Montana University System.

C. Satisfactory programs or projects for sabbatical periods include research, travel, related work in other institutions or private or business organizations, or other activities which the president or chancellor of the campus agrees will improve the staff member professionally, or which directly or indirectly benefit the campus and the state.

D. All sabbatical assignments shall normally be for a period of not less than one semester or more than an academic year for persons on academic year appointments and not less than one-half or more than one fiscal year for persons on fiscal year appointments; however, a person may request a shorter assignment.

F. Compensation from campus funds may not exceed two-thirds of the academic or fiscal year contract amount established for the individual for the period for which the sabbatical assignment has been approved. Special compensation arrangements involving funds from other than campus sources must be agreed upon and approved in keeping with the following conditions:

1. Compensation paid during a sabbatical assignment may differ from that paid for regular assignment because it may involve funding from sources other than regular campus funds such as fellowships, assistantships or other sources of limited income including funds available from grants or contracts administered by the campus.
2. All compensation must be received through the campus and no person may be additionally compensated for the time on sabbatical assignment by income from other employment during the same period;
3. Funds from non-campus sources must be made directly available to the campus for periodic disbursement to the person in addition to, or in lieu of, regular funds;
4. Funds from other sources may be used to supplement campus funds to increase the compensation up to, but not in excess of, that amount which the individual would have earned on regular assignment during the same period;
5. Compensation in excess of that which could have been earned on regular assignment may be approved only if all campus funds have been replaced by funds from other sources;

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- 6. Programs or projects which necessarily involve employment by an employer other than the campus may not qualify for sabbatical assignment but may be approved as leave without pay.
- F. A recipient of a sabbatical assignment will be expected to return to his/her campus for a period equal to the length of the sabbatical assignment or to repay money received from the campus while on leave.
- G. Persons on sabbatical assignment will continue to be eligible for employee benefits.
- H. Part-time faculty may be eligible for sabbatical assignments on a pro-rated basis.
- I. This policy shall be applicable only where a collective bargaining agreement is not in effect.

II. Procedures

- A. Faculty members may apply to their respective campus administrators for sabbatical assignment.
- B. All applications for sabbatical shall be submitted to the president or chancellor of the campus, or, if applicable, to the Commissioner of Higher Education, allowing sufficient time for evaluation and approval.
- C. In granting sabbaticals, campuses will be guided by the applicant's:
 - 1. Service which is appropriate to the person's regular assignment;
 - 2. Academic rank, if appropriate;
 - 3. Total length of service in the Montana University System; and
 - 4. Type and quality of the proposed program.
- D. Each president and chancellor shall submit by an annual summary of sabbaticals to the Commissioner of Higher Education and the Board of Regents upon request.

Definition

A sabbatical assignment is a change of duties which neither diminishes nor increases the extent of the person's employment with the university system. The recipient remains employed by the university system during the entire term of the sabbatical to the same extent he or she was employed while on regular assignment, regardless of the compensation agreed upon for the term of the sabbatical.

History:

Item 204-001, Nov. 27, 1967 as amended October 29, 1976 (the portion of this item relating to sabbatical leave is rescinded); Item 20-003-R0478, Sabbatical assignment, Montana University System (Revised), July 10, 1978, as revised November 18, 1999 and March 25, 2004 (ITEM 122-104-R0304, see Attachment 1). Item 137-103-R1107 approved November 16, 2007 (supporting material).