

GUIDELINES

Sabbatical Fellowships

Preamble

The Faculty of Medicine has established guidelines concerning sabbatical fellowships, including the application, review and approval processes which are intended to supplement Article 16 of the Collective Agreement and the statements published annually by the office of the Vice-President (Academic).

Sabbatical Fellowship Committee

The Sabbatical Fellowship Committee comprises the Department Heads Advisory Committee.

Following review of the applications submitted, the Sabbatical Fellowship Committee will make a recommendation to the Dean for or against each application. The Dean will take into account the recommendation of the Committee and the documentation provided by the applicant in making his decision.

Application Review Process

1. Normally, all sabbatical fellowship applications will be reviewed according to the schedule established annually by the Dean's office (which is set to meet the University's deadlines).
2. Sabbatical fellowship applications submitted to the Dean's office later than the date established by the Dean's office may be forwarded for consideration, provided the applicant and the Department Head address in writing the specific reasons for the timing of the application and confirm that the proposed absence will not interfere with the Department's teaching and scholarly activities.

An application received later than the date established by the Dean's office will be considered by the Sabbatical Fellowship Committee as soon as it can be included on the agenda of a regularly scheduled meeting of the Department Heads Advisory Group.

3. Appeals of the recommendations made by the Sabbatical Fellowship Committee or the Dean's decision will be handled in accordance with Article 16 of the Collective Agreement.
4. In accordance with University policy, approval of a sabbatical fellowship for a faculty member whose salary support is provided all or in part from external sources will be contingent upon the external funding source continuing to provide funding during the sabbatical term.

The process of obtaining approval from the external funding source normally is initiated by the Dean's office when the Dean approves the fellowship application.

Applicant's Responsibilities

It is the responsibility of the applicant to:

1. ensure that a full and complete application is submitted by the application deadline to the Department Head.

2. provide copies of the application by the application deadline to the Heads of all the Departments in which the full-time appointment is jointly held.
3. arrange for satisfactory coverage of academic responsibilities related to teaching, research and service during the period of the sabbatical term.
4. advise the Department Head of any Faculty resources required and any clinical activities to be carried out during the sabbatical term.
5. submit a report of the sabbatical fellowship to the President, through the Department Head and the Dean, within 3 months of completion of the sabbatical term.

Sabbatical Proposal

The sabbatical fellowship proposal is submitted on the form prescribed by the University, which includes a number of attachments. In addition, the Faculty of Medicine requires that statements related to the sabbatical site and arrangements for coverage accompany the application when submitted to the Department Head.

1. Sabbatical form: Attachment #1 - Detailed Description

The proposal shall be a plan written by the applicant which will include the following:

- 1.1 a clear and concise description of the objectives of the proposal, indicating linkages to a program of scholarship and/or teaching, rather than presenting an array of attachments to accompany a curriculum vitae. The detailed description will normally be limited to a maximum of three typewritten pages.
- 1.2 a clear relationship between the proposed project(s), e.g. research, program development, scholarly reading and study, etc., and the applicant's program of scholarship or teaching assignment. If completely new or exploratory directions are being taken in scholarly research, these shall be made explicit with regard to future endeavours.
- 1.3 the benefits to be derived from the proposed project(s) by the applicant's Department, Research Group, and the Faculty of Medicine.
- 1.4 when the proposed project(s) involves research project(s), a description of the research project(s) which includes some indication of research questions, design, and data analysis. It will also demonstrate initiatives undertaken to access research sites, i.e. letters requesting access, response letters of support from systems or institutions, etc.
- 1.5 specific indications of the expected outcomes, e.g. written products for publication, computer programs, specific course development, etc., that will result from the sabbatical term. Since the sabbatical term provides a block of time particularly for enhancing scholarship, it is expected that concrete results in the form of outcomes will be provided in the report following the sabbatical leave period.
- 1.6 timelines of the work to be completed on research or development projects and/or specific itineraries, as well as the written projects to be completed during the sabbatical term, i.e. proposals for conferences, books, articles for publication, computer programs, specific course development, etc.

...3.

2. Accompanying Material

2.1 Sabbatical site

Normally, the majority of the sabbatical term will be spent at an institution other than The University of Calgary, and minimal or no Faculty resources will be required during the sabbatical term.

2.1.1 For the portion of the sabbatical term which will be spent at another institution, the applicant will provide letters of invitation and of acceptance, and an outline of the arrangements related to the visit that have been made.

2.1.2 For any portion of the sabbatical term which will be spent at The University of Calgary, the applicant will provide an outline of the Faculty resources required during that period, e.g. office and laboratory space and equipment, secretarial support and, if any, the clinical activities to be carried out.

2.2 Coverage arrangements

2.2.1 The applicant will provide the Department Head with a written statement outlining details of the arrangements made to cover academic responsibilities related to teaching, research and service during the period of the sabbatical term. The applicant may provide details of alternate arrangements following advice from the Department Head that the initial arrangements are unsatisfactory.

2.2.2 In making a recommendation concerning the sabbatical application, the Department Head takes into account the arrangements for coverage. The Department Head's recommendation for approval of the sabbatical will include advice to the Sabbatical Fellowship Committee that the necessary arrangements are satisfactory.

Department Head's Responsibilities

1. The Department Head will review together *all* sabbatical proposals for a given academic year received from members of that Department by the October deadline before making a recommendation before or against approval of each application in order to ensure that all arrangements made for coverage taken together are satisfactory for the Department.
2. The Department Head is responsible for ensuring that adequate coverage arrangements have been made for all the applicant's teaching duties except graduate student supervision, but which include undergraduate, graduate, graduate clinical and continuing medical education activities; and that adequate coverage arrangements have been made for the applicant's service duties.
3. The Department Head will review the arrangements for coverage made by the applicant. If the arrangements are unsatisfactory, the Head will advise the applicant so that alternate arrangements can be made. If satisfactory arrangements cannot be made, the Head may recommend that the fellowship not be granted.
4. The Department Head's recommendation may be either that the fellowship be granted or not. It shall include a statement regarding the quality of the proposal and the benefits to be derived by the Department, in addition to the advice concerning the arrangements for coverage.
5. When the applicant holds a full-time appointment in more than one Department, the primary Department Head is responsible for obtaining input from the secondary and other Heads, preparing the joint recommendation and obtaining the signatures of the other Department Heads before submitting the recommendation to the Dean's office with the application.

6. Based on the staff member's sabbatical report, the Department Head will provide the Sabbatical Fellowship Committee with a brief written evaluation of the sabbatical, no later than 6 months after the sabbatical is completed.

Cancellation or Postponement of Approved Sabbatical Fellowship

1. Cancellation/Postponement initiated by the Dean

An approved sabbatical fellowship may be cancelled or postponed by the Dean, in accordance with Article 16 of the Collective Agreement.

2. Cancellation/Postponement requested by the staff member

- 2.1 The staff member may request the cancellation or postponement of an approved sabbatical fellowship. The request will be made in writing to the Department Head, outlining the reasons for the request, and submitted at least 30 days prior to the start of the approved sabbatical term.
- 2.2 The Department Head's recommendation to the Dean concerning the staff member's request will be made at least 20 days prior to the start of the sabbatical term, and a copy provided to the staff member. The recommendation will include advice concerning the abandonment of arrangements made for coverage.
- 2.3 The Dean's recommendation to the President concerning the staff member's request will be submitted as soon as possible after receipt of the staff member's request and the Department Head's recommendation. The staff member will be provided with a copy of the Dean's recommendation. The recommendation will include advice concerning the abandonment of arrangements made for coverage. In the event that contractual arrangements have been made for coverage during the sabbatical period which may not be abandoned without penalty, the Dean's recommendation will be that the request for cancellation or postponement be denied.
- 2.4 The final decision concerning cancellation or postponement requested by the staff member rests with the President.

Approved by:
Department Heads, November 3, 1997
Executive Faculty Council, January 28, 1998
Faculty Council, March 11, 1998