

ARTICLE ~~11~~ : PROFESSIONAL AND EDUCATIONAL DEVELOPMENT

Introduction

This Article is divided into ~~two~~ four sections: A) Sabbaticals; B) the Travel Fund; ~~and~~ BC) the Faculty Scholar Program; and D) Staff Fee Privileges. Other support opportunities normally offered through Colleges or through informal funding such as grants and other one-time funds are not part of this agreement.

Section A. Sabbatical Leave

The University understands that sabbaticals are an important element that contributes directly to the development, recruitment, and retention of high-quality faculty.

Sabbatical leaves are granted for purposes of research, writing, creative activities, advanced study, travel undertaken for observation and study of conditions in our own or in other countries affecting the applicant's field or related scholarly or professional activities. ~~(OAR 580-21-200)~~ Sabbatical leaves may be of one academic year, two-thirds of an academic year, or one-third of an academic year. Sabbatical Leave must fall within a single academic year.

Sabbatical leave for faculty employed on a "9-month" basis may be granted for an academic year (three terms) at 60% salary; two-thirds of an academic year (two terms) at 75% salary; and for one term at 85% salary.

The University shall normally grant a minimum of three (3) full sabbatical leaves in an academic year. If less than three (3) full sabbatical leaves are to be funded, then between October 15 and November 1, the Provost or designee and President of AAP or designee shall meet to discuss the number of sabbaticals the University will fund for the following fiscal year (July 1 through June 30).

The University may cancel any or all sabbaticals if prior to March 1 the President finds that the University's financial condition is such that a declaration of financial exigency or of program reduction or elimination may become unavoidable. Any faculty member whose sabbatical is cancelled under this clause shall receive credit for the next year of service toward the sabbatical eligibility period, as discussed in Section 1, below.

1. Eligibility

A faculty member appointed at .5 FTE or more, with the rank of Senior Instructor, Senior Instructor II, Assistant Professor, Associate Professor, or Professor, who is in good standing, may be considered for sabbatical leave:

Commented [S1]: Moved from Article 8, Introduction, and Sections C, D and E.

Commented [S2]: Open. Can AAP please provide an example?

Commented [S3]: Moved from Article 8, Section A.

Commented [D4]: waiting for clarification language

EOU: Good standing shall mean that the faculty member does not have a currently pending disciplinary action in his/her file, nor is the faculty member under investigation for an alleged violation of University rule or policy.

*EOU reserves the right to add to, modify, or amend proposals during the course of negotiations.

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

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

Once granted a sabbatical, a faculty member becomes eligible for subsequent sabbatical leaves every seventh year of employment, [subject to Section 4, below](#). [If a sabbatical initially granted is then cancelled under conditions in Section A, any subsequent service prior to the restoration of the cancelled sabbatical shall accrue toward the member's next period of eligibility.](#)

Commented [S5]: Open. Can AAP please provide an example?

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

[2. Application Process](#)

Commented [S6]: Moved from Article 8, Section G.

Step 1. Faculty anticipating a sabbatical must first discuss eligibility requirements with the appropriate ~~dean/director college dean or Library Director~~. Based on a positive review of required number of years at appropriate rank, the faculty member may proceed to the next step.

*EOU reserves the right to add to, modify, or amend proposals during the course of negotiations.

Step 2. The faculty member writes a letter of request to the ~~dean/director~~ ~~College of Dean or Director~~ detailing the scope of activities and the purpose of the sabbatical. The ~~Dean~~ ~~dean/director~~ may consult with the faculty member and may require additional information, documentation or discussion as necessary before proceeding to the next step.

Step 3. All sabbatical letters and requests will be provided to the appropriate peer review committee for review. The committee will provide an assessment rubric of the sabbatical projects as they apply to scholarship, creative activities, teaching, academic citizenship, or service to the region through “research, writing, and/or advanced study.” The committee report shall be forwarded to the ~~dean/director~~ ~~College Dean or Library Director~~.

Step 4. Supported by the committee report, the ~~dean/director~~ ~~Dean or Library Director~~ will forward the sabbatical requests with recommendations to the Provost in order of highest to lowest priority.

Step 5. The Provost will assess the requests from the colleges in consultation with the appropriate peer review committee and make a final recommendation to the President.

3. Salary

Commented [S7]: Moved from Article 8, Section B.

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

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

Commented [S8]: Confirm citation.

~~e.b.~~ b. Salary under subsection A(1)(b) of this ~~rule~~ Article shall be a percentage (determined by University policy, formerly OAR 580-021-

0225 or 580-021-0230) of the academic staff member’s annual rate in effect at the time the sabbatical leave begins.

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

4. Sabbatical Report

Commented [S9]: Moved from Article 8, Section H.

A report of the work completed during the sabbatical will be provided to the Dean of the appropriate College at the conclusion of the sabbatical year. The report should contain a copy of the letter requesting sabbatical and a summary of accomplishments aligned to intended goals and objectives.

5. Sabbatical Incentive Program

Commented [S10]: Moved from Article 8, Section F.

Subject to the amount specified in Article 11, Section 2, Item 3 (Scholar Awards), the University shall generally grant a full faculty scholar award for the summer leading into the sabbatical for faculty and Library Faculty with approved year-long sabbatical proposals that include, within the proposal, a component to be undertaken during the summer preceding the proposed sabbatical. Partial and full faculty scholar awards shall generally be granted for the summer leading into the sabbatical for faculty and Library Faculty with approved two-term sabbatical proposals that include, within the proposal, a component to be undertaken during the summer preceding the proposed sabbatical (as outlined in the table below). Faculty and Library Faculty must apply for these funds in the same manner in which one would apply for a faculty scholars program grant pursuant to Article Ten of this agreement.

Commented [S11]: Will need to update.

Sabbatical + Award Type	Sabbatical Instructions	Award Proposal Required?
Full Sabbatical + full award	Embed Paragraph in Sabbatical Proposal requesting full award	None Required
Two-Term Sabbatical + partial award	Embed Paragraph in Two-Term Sabbatical Proposal requesting a partial award	None Required
Two-Term Sabbatical + full award	Embed Paragraph in Two-Term Sabbatical Proposal requesting a full award	None Required

*EOU reserves the right to add to, modify, or amend proposals during the course of negotiations.

Section B. Faculty Travel Funds and the Faculty Scholar Program

1. The Faculty Travel Fund

- a. The purpose of the Faculty Travel Fund is to provide faculty with an opportunity to apply for support for necessary travel to conduct scholarly work, to attain increased knowledge or skills to improve teaching, or to acquire necessary materials, skills, and/or information necessary for curriculum development or University program development. The Faculty Travel Fund is open to all faculty regardless of rank, tenure or appointment status.
- b. The maximum amount of the award shall be ~~set by the Research and Grants Committee.~~ ~~\$2000~~ ~~\$3,000~~. All faculty in the bargaining unit are eligible for these funds. The Research and Grants Committee will be responsible for administering and reporting the allocation of these funds, until such time as an alternative method is derived.
- c. The total amount of funding for this category is:

~~\$60,000 for 20163-20174~~

~~\$60,000 for 20174-20185~~

~~\$60,000 for 20185-20196~~

Commented [D12]: we want this amount set in the contract

Commented [S13]: Amounts to be offered with EOU's economic offer.

Section C. Faculty Scholars Program

Eastern's Faculty Scholars Program is an important means by which the University assists teaching faculty in their ongoing dedication to scholarship. All members of the teaching faculty and Library Faculty are encouraged to apply for the Faculty Scholars Program summer salary awards and the professional opportunities that they provide.

The purpose of the Faculty Scholars Program is to provide incentive, opportunity, and facilitation of scholarship. The express purpose of the funds is to help support faculty and Library Faculty who, based on excellent potential for scholarly achievement, may be awarded a summer salary to advance their work. Because funds are limited, faculty scholars awards are not meant to support or subsidize all faculty scholarship. The funds are intended to help support 1) recruitment and retention initiatives, 2) proposals from junior faculty and Library Faculty who may need support to develop a research agenda,

*EOU reserves the right to add to, modify, or amend proposals during the course of negotiations.

and 3) exceptionally strong proposals from faculty who have demonstrated excellence in scholarship.

Section B. 1. Award Process

~~1.~~ Faculty Scholars Award Process

Awards will be recommended by the Deans in consultation with Division Chairs and Scholarship Committees selected for each college.

Step I. Interested teaching faculty members may consult with their Division Chairs or College Deans/Library Director about proposal ideas. The Division Chair or Dean/Director will, based on the initial consultation, encourage the faculty member to fully develop the proposal. This step is critical as it intends to help shape a successful proposal from the onset.

Step II. Based on feedback from the Division Chair or Dean/Director, the faculty member/Library Faculty submits a formal proposal. The deadline is announced by the Provost's Office at the beginning of each academic year. The proposal should clearly specify an outcome or product of the project and show the relationship of that outcome to criteria for the award of the stipend. Proposals should make clear what support is needed and what time frame will be required to complete the project:

- a. The proposal should succinctly describe the project in sufficient detail to indicate that it has been well conceptualized; maximum page limit for the body of the proposal is three pages. The page limit is firm.
- b. The project should have a clearly identified and realistic set of objectives (including a tangible product) which may be reached by the beginning of the next academic year. Projects taking more time must still produce, by the beginning of Fall term, a tangible product that demonstrates appropriate progress toward the project's objectives. Preparation of a proposal for extra-mural support of a larger undertaking does constitute a "tangible project" and could, conceivably, be the only tangible project where a partial stipend is proposed.
- c. The proposal should clearly indicate how the project would contribute to the faculty member's professional development by

***EOU reserves the right to add to, modify, or amend proposals during the course of negotiations.**

July 14, 2016

maintaining or increasing currency in the faculty member's discipline.

Step III. The Dean/Director will select, within each division from which a proposal has been filed, a Scholarship Committee composed of at least 2 members of tenure or tenure track faculty and one fixed term faculty member. No members shall be selected that have submitted a current proposal. In the case of Library Faculty, the Library Director will consult with the Dean of Arts and Sciences to appoint at least two members of the scholarship committee from faculty in either College in the event that there is not a sufficient number of qualified Library Faculty to serve on its committee.

Step IV. The Committee will review each proposal and will evaluate the strengths and weaknesses based on the merits and the potential for the outcomes of the project to culminate in a presentation, paper, creative piece or other peer-reviewed work. The Committee will make recommendations to the Dean/Director on the merits of each proposal.

Step V. The Dean/Director will, in consultation with Division Chairs, make final recommendations to the Provost. Where the recommendations by the dean or director differ from those of the Scholarship Committee, the dean or director shall meet with that committee to explain her/his recommendations prior to submitting her/his recommendations to the provost.

Step VI. If the Provost disagrees with or changes recommendations from the Dean/Director and Division Chairs, s/he will provide a written rationale. The Provost will announce successful applications and award amounts.

Step VII. At the completion of the proposed and funded activity, the faculty member files a report with the Dean/Director. This report should detail the accomplishments of the activity. The report should be presented by the end of the academic term in which the faculty member resumes normal responsibilities.

2. Guidelines and Appropriate Tasks

The following guidelines and criteria will be employed in reviews of proposals:

***EOU reserves the right to add to, modify, or amend proposals during the course of negotiations.**

2016 EOU/AAP Negotiations
EOU Counter Proposal*
July 14, 2016

- a) Research involving scholarly or creative development leading toward professional papers and publications, performance, or other public presentation appropriate to the field of expertise.
- b) Beginning in the academic year ~~2010-11~~, 20% of the total funds available for summer stipend awards shall be awarded as partial awards of up to \$2,500 through the above process for Instructional Development involving course revision (including developing courses to meet university outcomes and new requirements), improvement of teaching methodology and skills, updating faculty in their disciplinary fields, retraining faculty for new assignments, providing instructional resource materials and consultation, developing interdisciplinary courses, and promoting activity by faculty in professional organizations.
- c) Sabbatical Incentive: As outlined in Article 8, Section A, paragraph (10), the University will, for approved two and three-term sabbatical proposals that include, within the proposal, a component to be undertaken during the summer preceding the proposed sabbatical, generally provide summer salary support for the summer leading into the sabbatical.
- d) University support involving activities through which faculty can develop new skills or insights of value to the university including attendance at conferences, association meetings, grant development and other events that provide direct assistance to the university's efforts to improve, upgrade, or enhance one or more of its programs.
- e) Past performance may be taken into account as an indicator of future potential in the review of proposals. Full awards are \$11,250; Partial awards are up to \$5,625. Faculty who have received full awards in the two preceding summers are not eligible for a full award in the third consecutive summer. Faculty may receive awards in three consecutive summers as long as at least one of the awards is a partial award. Faculty who receive awards in three consecutive summers are not eligible for any award, partial or full, in the fourth consecutive summer. For Faculty on 11 or 12 month contracts, faculty earning a stipend award will work with the Dean/Director to develop a plan to "buy-out" a term or portion of a term of service in lieu of the cash award.
- f) Report: At the completion of the proposed and funded activity, the faculty member shall file a report with the Dean's Office for Faculty Scholar Awards and with the Dean's and the Provost's Office for Sabbatical Incentive Awards. These reports will detail the accomplishments for the

Commented [S14]: Does this need updating?

Commented [S15]: Will change reference.

*EOU reserves the right to add to, modify, or amend proposals during the course of negotiations.

activity, specifically in terms of the criteria for awards listed above and the specific activities proposed in the original proposal. The report shall normally be presented by the end of the academic term in which the faculty member resumes normal responsibilities. Proposals which are funded along with summary reports or tangible products will be made available for faculty each year in the office of the appropriate Dean/Director.

3. Scholarship Committee

The Scholarship Committee shall first identify those proposals that satisfactorily meet the criteria of this Section. The Committee shall then evaluate the qualifying proposals by creating specific evaluation criteria. The Committee shall report its findings in the form of a recommendation to the Dean/Director.

4. Scholar Awards

The amount of funding available in for all awards is as follows:

~~20163-20174: \$110,500~~

~~20174-20185: \$110,500~~

~~20185-20196: \$87,000~~

Commented [S16]: Amounts to be offered with EOU's economic offer.

~~Section CD. Other Professional Development Opportunities~~ Staff Fee Privileges

~~Consistent with OUS Board Policy and pursuant to the limitations or restrictions applied hereafter, bargaining unit members are eligible to take classes at any OUS institution consistent with the OUS tuition fee reduction program.~~

Pursuant to the joint letter signed by Presidents of EOU, WOU, SOU, OIT, PSU, OSU and UO, and consistent with then Board of Higher Education administrative rules 580-022-0030 and 580-022-0031 in effect July 1, 2014, staff fee privileges will continue to be extended to one family member as defined in the IRS code or to a domestic partner as defined per PEBB affidavit.

Commented [S17]: Language agreed to by SOU.

~~Section DE. Forwarding of Funds to Next Academic Year~~

Funds allocated in any academic year for the Faculty Scholars and Sabbatical Incentives Program Fund, Merit Fund, the Recruitment and Retention Fund or the Faculty Development Fund shall be spent or the net balance forwarded to the Faculty Scholars

*EOU reserves the right to add to, modify, or amend proposals during the course of negotiations.

2016 EOU/AAP Negotiations
EOU Counter Proposal*
July 14, 2016

and Sabbatical Incentives Program Fund for the subsequent academic year, including awards that are declined or rescinded after the award date. By October 1 of each year, the University shall send to AAP a report on each fund itemizing the beginning and ending balance of each fund, as well as the name and amount of each recipient for the previous academic year, as well as the amount forwarded to the current year.

***EOU reserves the right to add to, modify, or amend proposals during the course of negotiations.**