

Memorandum of Agreement (MOA)
between Montclair State University (“the University”) and AFT Local 1904 (“the Local”) on
Sabbatical Leave Procedures.

The terms, conditions, and procedures for sabbatical leaves for Faculty members and Librarians are specified by the State-wide Agreement between the Council of NJ State College Locals and the State of New Jersey (State-wide Agreement), as well as the Local Selected Procedures Agreement and the Agreement on Sabbatical Procedures (2008) between the University and the Local.

In order to facilitate sabbatical leaves that support the mission and goals of the University and advance the research, scholarship and creative work of the members of the Faculty and Librarians, the modifications, amendments and specifications memorialized herein have been agreed to by the University Administration and the Local.

The University and the Local agree to the following:

- I. Eligibility for Sabbatical Leave shall be determined by the State-Wide Agreement.
- II. *Criteria*
 - A. The current criteria for evaluation of applications for sabbatical leave (applications) shall be posted on the University’s Website.
 - B. The evaluation criteria in effect at the time of execution this Agreement are appended hereto for reference (Appendix A).
 - C. Should the evaluation criteria be changed, the Provost or designee shall provide written notice to the Local. In no case shall the evaluation criteria be changed fewer than sixty (60) calendar days prior to the deadline for initial submission of applications.
 - D. In any given application process, the same criteria shall be used in all steps of review, and for all applications.
 - E. Each application shall be considered according to the merits relative to the criteria, without regard to the total number of applications, nor to the relative timing of proposed sabbatical leaves among the members of the Faculty and Librarians.
- III. *Budgetary Support*
 - A. Applicants for sabbatical leave may also apply for budgetary support for the following:
 1. Domestic travel (up to \$1000),
 2. International Travel (up to \$2500),
 3. International Housing in residence (up to \$7500),
 4. materials (up to \$2000),
 5. other activities (up to \$2000)
 - B. Requests for budgetary support shall not be considered in the review of an application, nor shared with reviewers. Instead, such requests shall be sent directly to the Provost or designee, with the same deadline as for the rest of the application

IV. *Calendar for Application, Review, and Notification*

- A. The deadline for submission of applications for sabbatical leaves to be taken in AY 2024-2025 shall be 31 January 2024.
- B. The deadline for sabbatical leaves to be taken in AY 2024-2025 and later years shall be on a business day between October 15 and November 15 of the preceding Academic Year.
- C. The call for applications, specification of the required application materials, and other necessary instructions for application, shall be disseminated no less than thirty (30) calendar days prior to the deadline for application.
- D. The Calendar for all steps of review and notification shall be consistent with agreed-to procedures.
- E. The Administration shall consult with the Local on the Calendar.

V. *Materials and Means for Application*

- A. Application materials shall consist of the following:
 1. current CV;
 2. project description, not to exceed five (5) pages, single-space text with minimum twelve-point font size;
 3. bibliography/references for the description, not to exceed one (1) page;
 4. any supplemental supporting materials the applicant wishes to provide (e.g. cooperation agreements with other universities or organizations, book contracts, etc. - optional) ;
 5. a copy of the proposal and final report from the applicant's last sabbatical leave (if applicable);
 6. budget request, with rationale, not to exceed two (2) pages, sent separately (optional).
- B. All applications, reviews, responses, and written notices related to sabbatical leaves shall be handled electronically via an appropriate application (e.g., Interfolio) determined by the University Administration. Any guidance documents and/or forms shall be presented to the Local prior to distribution to applicants. Arrangements shall be made for preview access by the designee of Local to the system that will be used for the handling of applications.

VI. *Review of Applications*

A. *Overview*

1. All applications shall first be reviewed concurrently by the respective Primary-Unit Peer Review Committee (PPRC) of the primary unit (school or department) of the applicant's appointment and respective Dean, and then subsequently by University Sabbatical Review Committee (SRC), who shall make recommendations to the Provost.
2. At each step of review: (i) the application, including all materials, preceding final report(s), and any responses by the applicant are forwarded to the reviewer (individual or committee); (ii) the reviewer provides to the applicant a copy of the initial version of their review, including any recommendation; (iii) the applicant has a maximum of four (4) business days to request a meeting to discuss the report and/or give a written response; (iv)

- the reviewer provides to the applicant a copy of the final version of the report, with any revisions/differences from the initial version; (v) the applicant has a maximum of four (4) business days from receipt of the final version of the review to prepare a response; (vi) the final version of the review and any written response by the applicant are forwarded to the next step of review, along with the application materials, and any preceding final reports and responses.
3. Each written review should identify the strengths of the proposal along with any concerns, if warranted. The review should specifically indicate whether an application is recommended for sabbatical, be prepared in a manner that supports a potential response by the applicant, and also informs subsequent reviewers.
 4. At any time during the review process, an applicant may withdraw the application and remove the application materials, including any completed reviews, from the system employed to handle the application and review process.
- B. *Concurrent Review by Primary-Unit Peer-Review Committee and Dean*
1. A PPRC shall be established in each department/school for the first-step review of applications for sabbatical leave.
 2. The members of the PPRC shall be determined in each primary unit by democratic process, except that members of the PPRC:
 - a) are elected for a term of one academic year
 - b) must be tenured during their term of service;
 - c) may not themselves apply for sabbatical while serving on the PRC;
 - d) may not serve more than three (3) consecutive academic years.
 3. In Academic Year 2023-2024, the election of the PPRC and the chairperson of each PPRC shall be completed no later than January 29, 2024. For Academic Year 2024-2025 and following, the election of the PPRC and committee chairperson shall be completed in the spring term of the preceding academic year.
 4. In the event that the Faculty of a primary unit decide that an insufficient number of eligible members are available to serve on their PPRC, they may request that additional members be selected from other departments within the College/School or the University. These requests shall be submitted to the designee of the Provost for review and approval in writing.
 5. The PPRC shall provide a written review of each application according to the given criteria.
 6. The Dean shall separately and concurrently review each application according to the given criteria, and provide an independent written review.
 7. The reviews of the Dean and the PPRC should be one hundred to two hundred words.
 8. The reviews and recommendations of each PPRC and Dean shall be provided simultaneously to the SRC.

C. *University Sabbatical Review Committee*

1. Each application shall be reviewed by every member of the SRC, as well as discussed individually by the entire committee.
2. The SRC shall prepare a written review of each application according to the given criteria. Each review should be one-hundred to two-hundred words.
3. The preparation of written reviews shall be divided in an equitable manner among the members of the SRC, with the final form of the written report representing the collective opinion of the SRC.
4. For each application, the SRC shall, as a whole, determine a score of one (1) (lowest) to ten (10) (highest) relative to each of the enumerated evaluation criteria, as well as additional points (to a maximum of five (5)) for applications with expected outcomes that satisfy "Additional Considerations" as listed in the evaluation criteria.
5. The scores shall be used to compose a ranked list of those applications recommended by the SRC for sabbatical as per the LSPA. Both the scores and the ranked list shall be forwarded to the Provost along with the final written reviews of the SRC.

VII. *Provost and University President*

- A. After consideration of the applications, supporting material, preceding reviews and recommendations, the Provost shall determine whether to recommend or not recommend each application to the President of the University.
- B. In reviewing applications, including the preceding reviews, as well as the scores and ranked list provided by the SRC, the Provost shall use the enumerated evaluation criteria as well as any Additional Considerations, and the scoring system delineated in VI.C.4
- C. If the Provost determines that an application from among those recommended for sabbatical by the SRC does not sufficiently satisfy the criteria, and will therefore not be recommended to the President of the University, the reason(s) for that determination shall be described in a written narrative of one-hundred to two-hundred words and include the itemized score assigned by the Provost.
- D. The Provost shall provide timely written notice of recommendations and non-recommendations to the respective applicants and the SRC, including the written narratives regarding any non-recommendations (cf. VII.B), and consistent with the procedures of VI.A.2.
- E. The Provost or designee shall review budget requests for those sabbaticals to be recommended to the President of the University. The amount to be awarded in response to each request shall be included with written notice to the applicant of the determination of the Provost regarding recommendation of the application.
- F. The Provost, or designee, shall confer with deans, applicants, and their respective department chairpersons (or school directors and ADFs) to determine if a sabbatical leave has the potential for an adverse collateral effect on the operations of a department, school, or academic program.

Changes in the timing of a sabbatical leave may be addressed via mutual agreement among the applicant, the responsible dean and the Provost or designee.

- G. The President of the University shall review the Provost's recommendations for sabbaticals and make recommendations to the Board of Trustees of the University for final approval. The President shall provide timely written notice to applicants prior to recommendation to, and action by, the Board of Trustees with respect to the award of sabbatical leaves
- H. The Provost shall host an annual meeting to recognize and highlight the activities of those members of the Faculty taking or having recently completed sabbatical leaves, as well as the results of the projects supported and enabled by sabbatical leaves.

VIII. *Responsibilities of Awardees*

A. *Interim Status Report*

1. Individuals with a full-year sabbatical shall complete an interim status report, not to exceed two pages, no later than January 21 of their sabbatical year.
2. Individuals with a one-semester sabbatical shall complete an interim status report, of up to two-hundred and fifty (250) words, between sixty (60) and seventy (70) calendar days after the start of the term of their sabbatical.
3. The interim status report should summarize progress to date as well as identifying any changes in planned activities or expected outcomes.
4. The report should be submitted to the relevant Dean, with a copy to the Provost.
5. Written responses to the report, if any, shall be provided by the relevant dean, in which case the awardee shall have a right to a meeting with the dean and a written reply.

B. The final sabbatical leave summary report shall include a list of all work products, presentations, performances, grant proposals, new curricula, and related work facilitated by the sabbatical leave.

C. Sabbatical awardees must agree in writing to resume their duties at the University for a period equivalent to their sabbatical leave. Failure to return to the University for an amount of time equivalent to the sabbatical leave obligates the sabbatical awardee to repay to the University all salary monies received during the sabbatical leave.

D. *Outcomes of Sabbatical*

All papers, books, manuscripts, creative works or other aspects of work product, scholarship, and research that are attributed to the sabbatical period should be noted as sponsored by the University.

IX. *Term of Agreement*

- A. This Agreement shall remain in full force and effect at least until June 30, 2026. Thereafter,

this Agreement shall remain in effect unless and until either party shall provide written notice to the other of their intention to reopen and renegotiate the Agreement.

- B. Reopener negotiations shall commence within twenty (20) business days after receipt of the notice unless otherwise agreed upon by the Parties.
- C. During the pendency of any reopener negotiations, this Agreement will remain in full force and effect.
- X. This Agreement does not otherwise alter nor supersede other agreements between the State of NJ and the Council of NJ State College Locals, nor any agreements between Montclair State University and AFT Local 1904, including the Local Selected Procedures Agreement.

In witness whereof, the representatives of the University Administration and AFT Local 1904 have acknowledged their understanding of this Memorandum of Agreement and affix their signatures below.

For Montclair State University

For AFT Local 1904

22 Dec 2023

Junius J. Gonzales, M.D., M.B.A. David Trubatch

Provost and Senior Vice President
for Academic Affairs

David Trubatch, VP for Negotiations

Appendix A
Criteria for Evaluation of Applications for Sabbatical Leave

1. Project Plan

This criterion encompasses the execution plan for the project and the extent to which the plan is sufficient to complete the project and deliver results. It also addresses the preparedness of the scholar or researcher to execute the plan.

2. Significance

The subject matter to be explored during the course of the proposed sabbatical is of substantial significance and importance. The applicant should specify and elucidate connections between the subject matter of the project and the academic programs as well as the applicant's program of research, scholarship, and creative work.

3. Impact

The successful execution of the project will contribute to a larger body of scholarship, research, creative work, and/or practice. The applicant should describe how the project will serve to advance the scholarship and/or creative work for a discipline and bring acclaim to the researcher and/or the institution because of the impactful outcomes. Impacts may include potential advancements/improvements in academic programs, curricula, and/or improved student/program outcomes, as well as the capacity of the University to advance its mission.

Additional Considerations:

Additional points can be awarded to a project that can detail and specify expected outcomes:

- a) requires leave to go to field placements or other universities to have access to resources for success of the work
- b) likely leads to substantial funded research programs,
- c) requires broad collaborations between Montclair and other academic and non-academic institutions to achieve a result
- d) has significant interdisciplinary components that can impact academic programs or viable research, scholarship, or creative activity
- e) aligns with current Montclair State University activities on community engagement, student success or DEIB, and has the potential for enhanced impact on the same.