

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

The Parties agree to the following:

- I. The terms, conditions, and procedures for sabbatical leaves for Faculty members and Librarians are specified by Article XXVII [Sabbatical Leaves] of the State-wide Agreement, the Local Selected Procedures Agreement (“LSPA”), and the Agreement on Sabbatical Procedures (2008), except as amended herein specifically governing applications submitted during the Spring 2023 Term for sabbatical leaves taken in AY 2023-2024. All amendments herein apply only to applications submitted during the Spring 2023 Term for sabbatical leaves in AY 2023-2024.
- II. The established sabbatical leave application criteria shall be published on the University’s website and are appended hereto for reference.
- III. The Spring 2023 deadline for submission of applications for sabbatical leave is 18 January 2023. The Administration will consult with the Union on the calendar/timeline for subsequent steps of review consistent with agreed-to procedures.
- IV. The Web-based Interfolio system will be used to manage sabbatical application submissions, reviews, and responses.
- V. The following sabbatical leave procedures will apply, on a non-precedential basis, for applications submitted during the Spring 2023 Term for sabbatical leaves taken in AY 2023-2024:

8.3 Applicant Submission

- 8.3.1 Applications will be provided to candidates on or before the date stated in the University administrative calendar. Application materials, including a current curriculum vitae, the sabbatical proposal, a copy of the proposal and final report from the applicant’s last sabbatical leave (if applicable), and any supplemental documentation, should be uploaded to Interfolio.
- 8.3.2 At any time during the following review process, an applicant may withdraw the application for a sabbatical leave and remove it, including any reviews completed, from Interfolio.

8.4 Peer Review Committee "PRC" Review

- 8.4.1 A Peer Review Committee shall be established for the first step of reviewing and recommending proposals for sabbatical leave. The members and length of term of office of the PRC will be determined in each department and school by democratic process, except that no department chairperson or school director may serve, and all members of the PRC must be tenured. No candidate for promotion may participate in the promotional procedures in the PRC, but may serve with regard to other personnel decisions. No candidate for sabbatical may participate in the sabbatical procedures in the PRC. In the event that a department or school decides that an insufficient number of eligible members is available for requisite personnel actions, it 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 written approval. No person may serve at more than one level of review and recommendation for any personnel action.
- 8.4.2 The Peer Review Committee (PRC) shall review and recommend proposals for a sabbatical leave at the departmental level in each college and school. The PRC shall review applications and all materials submitted by an applicant in order to determine whether or not the application meets the criteria to be recommended for a sabbatical leave. The PRC shall write a brief narrative evaluating each application and either recommend or not recommend the applicant. The recommendation and written narrative will be sent to the applicant via Interfolio.
- 8.4.3 If the PRC identifies a potential issue related to the timing of the leave, the Committee will meet with the applicant(s) involved informally to resolve the issue by adjusting the length or the term requested.
- 8.4.4 Within two (2) business days of receiving a recommendation from the PRC, the applicant may either meet with the chair/head of the committee and/or submit a written response via Interfolio. The purpose of the response shall be limited to clarification of material already included in the application.
- 8.4.5 Within two (2) business days of receiving the applicant's response, the PRC shall respond in writing via Interfolio. The committee may confirm its original recommendation; however, the written response should address the issues raised by the applicant.
- 8.4.6 The PRC will forward to the cognizant department chairperson or school associate director for faculty (ADF) the application and all associated documents for the applicant(s) via Interfolio.

8.5 Second-Step Review

8.5.1 The second review will be undertaken by the chairperson of the cognizant department or associate director for faculty (ADF) of the cognizant school, who will review each application and all materials submitted by the applicant, the recommendation and written narrative of the PRC, along with any responses, will evaluate on the basis of the established criteria and make a recommendation. The recommendation and a brief written narrative will be sent to the applicant via Interfolio.

8.5.2 Within two (2) business days of receiving the recommendation from the chairperson or ADF, the applicant may meet with the chairperson or ADF and/or submit a written response via Interfolio. The purpose of the response will be limited to clarification of material already included in the application.

8.5.3.1 Department chairpersons will forward to the cognizant dean the applications and all associated documents via Interfolio.

8.5.3.2 Each ADF will forward the applications and all associated documents via Interfolio to the cognizant school director, who will review each application and all materials submitted by the applicant, the recommendations and written narratives of the PRC and ADF, along with any responses. The school director will evaluate on the basis of the established criteria and make a recommendation. The recommendation and a brief written narrative will be sent to the applicant via Interfolio.

8.5.3.3 Within two (2) business days of receiving the recommendation from the school director, the applicant may meet with the chair or ADF and/or submit a written response via Interfolio. The purpose of the response will be limited to clarification of material already included in the application.

8.5.4 If a department chairperson or school director identifies a potential issue related to the timing of the leave, they will meet with the respective PRC and the applicant(s) involved in an effort to resolve the issue. If the issue is not resolved, the chair/director will inform the cognizant Dean in writing.

8.6 Dean's Review

8.6.1 The dean will review each application and all materials submitted by the applicant, the written narrative of the PRC and any responses to the recommendation of the PRC from the candidate, and the written narratives of the department chairperson, ADF, and school director (As applicable), and any responses to the recommendations from the candidate, in order to determine whether the application meets the criteria to be recommended for a sabbatical leave. The dean shall then write a brief narrative evaluating each application on the basis of the established criteria and either recommend or not recommend. The dean's recommendation and written narrative will be sent to the applicant via Interfolio.

- 8.6.2 Within two (2) business days of receiving the recommendation from the dean, the applicant may meet with the dean and/or submit a written response via Interfolio. The purpose of the response will be limited to clarification of material already included in the application.
- 8.6.3 After receipt and review of the candidate's response or a meeting with the candidate, the Dean may revise the written narrative and recommendation to address the issues raised by the applicant or forward their original recommendation. The dean will forward the application, their narrative, and all associated materials to the University Sabbatical Review Committee, via the Interfolio.
- 8.6.4 If the dean identifies a potential issue related to the timing of the leave, the dean will meet with the PRC and the applicant(s) involved in an effort to resolve the issue. If the issue is not resolved, the dean will so inform the Provost in writing.
- 8.7 University Sabbatical Leave Committee Review
- 8.7.1 The University Sabbatical Leave Committee (SRC) will review all sabbatical applications and, on the basis of the established criteria, will score each applicant on a scale of 0 through 10, with 10 being highest, on each criterion. The Committee will then rank- order the applicants on the basis of the scores. To the extent that two or more applications are equally meritorious, the time since the last sabbatical leave will be used to determine the order in which applications are ranked. The Committee will then determine which among the applications are recommended (meet criteria) and which are not recommended (do not meet the criteria).
- 8.7.2 The Committee will inform each applicant of its recommendation via Interfolio and, if recommended, the rank assigned by the Committee out of the total number of recommended applicants. If an application has not been recommended, the Committee will provide to the applicant a brief written narrative setting forth the basis for its negative recommendation.
- 8.7.3 Within two (2) business days of receiving the recommendation from the SRC, the applicant may submit a written response via Interfolio. The purpose of the response will be limited to clarification of material already included in the application.
- 8.7.4 After two (2) business days of notifying all applicants, the University Sabbatical Leave Committee will use Interfolio to forward to the Provost all complete sabbatical applications and associated documents as well as a list of the recommended applications and their rankings, and an alphabetical list of applicants not recommended and their associated written narratives.
- 8.8 Provost Review
- 8.8.1 After considering the materials submitted by the applicants and evaluations provided by all preceding reviewers, the Provost will either recommend or not recommend each application.
- 8.8.2 If the Provost determines that a recommended/ranked application from among those forwarded

by the Sabbatical Review Committee does not meet the criteria set forth by the University, the reason(s) for that determination will be provided in a written narrative, via Interfolio, to the applicant.

8.8.3 Within two (2) business days of receiving a negative recommendation from the Provost, the applicant may request to meet with the Provost and/or provide a written response. Within two (2) business days of the meeting, the Provost, will notify the applicant, via Interfolio, of the final recommendation.

8.8.4 If the Provost determines that applications they have evaluated as meritorious from a single department/program in any one year would be precluded from a positive recommendation for sabbatical leave only because of the timing of the leave, and the dean has not thoroughly addressed this criterion in his/her evaluation, the Provost will consult with the PRC and dean to explore the possibility, if any, of resolving the situation. Such exploration does not bind the University to approve all affected applications.

8.8.5 The Provost will use Interfolio to forward the complete application materials, including their recommendations and written narratives, if any, to the President and the Chair of the University Sabbatical Review Committee, and to forward to each applicant the recommendation and written narrative, if any.

8.9 President's Review: Final Recommendations

8.9.1 The President will review each application and all materials submitted by the applicant, including the recommendations and written narratives, and will evaluate on the basis of the established criteria and make a recommendation to the Board of Trustees for final approval.

8.10 Sabbatical Leave Report

Within four weeks after returning to the University, faculty members and librarians receiving a sabbatical leave will submit a summary of the activities or project accomplishments during the sabbatical indicating how their goals were met. This summary shall be submitted by email to the Provost and a copy will be uploaded to the online system by the Provost's Office. At the time of application for the next sabbatical, or any time preceding, the faculty member or librarian may submit one or more updates with respect to outcomes/results emanating from the previous sabbatical leave realized later than four weeks after returning to the University.

IX. 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, except as stipulated above.

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



Provost and Senior VPAA
Montclair State University
January 23, 2023

Date



David Trubatch, VP for Negotiations

AFT Local 1904

20 Jan 2023

Date

Criteria for Consideration of Applications for Sabbaticals

These criteria are to be applied at each level of review and should form the basis of the narrative evaluations at each level. The applicant is not expected to specifically address each criterion in the application, but there must be sufficient documentation provided for reviewers to formulate a response to each criterion.

1. The significance of the proposed sabbatical project and its potential to make a valuable contribution to the applicant's disciplinary field;
2. The scholarly or artistic past record of accomplishments of the applicant that demonstrate the applicant's ability to successfully accomplish the proposal within the time proposed;
3. The value of the project to the applicant's professional advancement;
4. The overall value of the project, if completed, to the mission of the University;
5. The care, comprehensiveness and crafting of the plan of work for the sabbatical;
6. Documentation related to the stage of work of the proposed project and the readiness of the applicant to undertake and make significant progress on the project;
7. Considerations related to the timing of the sabbatical related to the plan of work (viability of required travel, etc);
8. Documentation from institutions or individuals whose resources or collaboration are implicated in the plan of work;
9. Documentation from potential publishers, producers, presenters or funding agencies related to the proposed project;
10. The scope and quality of the applicant's overall contributions to the University;
11. The alignment of the proposal and its timing to the needs of the instructional program with which the applicant is associated.

Updated September 2020