Paying for travel/living expenses while on Sabbatical or Leave with or without pay

In the past, we have had situations in which faculty planned to use gift/grant funds to help support their living expenses while they were traveling abroad and doing research connected with their leave or sabbatical. The campus has very strict guidelines on the use of University funds for living expenses. **As a general rule, the University does not allow for reimbursement of living expenses such as lodging and meals while on sabbatical. However, some research awards may allow for reimbursing some or all of these expenses if they are awarded for that purpose.**

Per sabbatical guidelines via link below, under Conditions, item number 3:

"the faculty member may seek additional support specifically for travel or unusual living expenses incidental to the sabbatical program without restriction by the full compensation maximum"

This excerpt from the sabbatical guidelines refers to when faculty are planning on a sabbatical leave and anticipate incurring travel/living expenses such as airfare, lodging/rent, meals, etc. If so, they need to apply for grants/awards which would specifically allow such expenses while on sabbatical since under normal circumstances such expenses are not reimbursable by the University when a faculty member is on sabbatical. **It is only in very rare situations and under unusual circumstances that the University would consider allowing such expenses be paid from existing University funds.**

Also, per sabbatical guidelines:

"In the sabbatical application, the faculty must specify all grants or other awards applied for that are intended for use during the period of the sabbatical."

If a faculty member has an existing grant/award that would allow travel/living expenses, we'll seek RSP's approval to make sure we are in compliance with the granting agency (again, prior to incurring these expenses).

In general, **existing** University Professorships/Discretionary funds cannot be used for sabbatical living expenses since the majority of these professorships are from gift funds and the award letter normally states that the funds are available for unrestricted use of the faculty member **as long as the expense is within University policies and procedures.**
Here are the questions that need to be addressed:

1. Sabbatical/leave location
2. How long will you be there?
3. What is the research you are working on?
4. What expenses are you planning to submit for reimbursement?
5. Why is it necessary for you to be off-campus to do the research?
6. Allocable: Is all your time restricted to doing research on the grants you intend to charge?
7. You also need to notify the RSP Accountant in charge of the grant(s) you will be using when you are off-campus on your sabbatical or leave.

Please contact Assistant Dean, Mehdi Rezai rezai@ls.wisc.edu if you have any questions and/or clarifications.
**Application Procedures**  
**UW-MADISON FACULTY SABBATICAL PROGRAM**

Applicants should submit one copy of the proposal to the department. Check with your department chair for the due date.

The proposal must contain:

1. Summary of current vita (2-3 pages maximum);
2. Completed Proposal Cover Page;
3. Description of the proposed sabbatical program including its anticipated benefits to the instructional mission of the department, program or school/college (2-3 doubled-space typed pages);
4. Compensation Received During Sabbatical Assignment Form. List of all grants and pending awards to be used during the sabbatical. Note: faculty members are not eligible to receive a Sabbatical and Faculty Development grant effective during the same time period.
5. Agreement form. Note: A faculty member must agree to return to UW-Madison for at least one academic year of service after the conclusion of the sabbatical, or repay any compensation (salary, plus the University’s share of fringe benefits) received from the UW System during the sabbatical. (This condition will be interpreted to mean that the faculty shall be in residence as a full-time faculty member at UW-Madison for at least one academic year after the leave in order that the results and benefits of the sabbatical experience can be shared with colleagues and students.)

Each application must be reviewed by the department executive committee. Where departments have multiple applicants, the proposals should be ranked by the executive committee. Applications must be sent to the appropriate Dean/Director (check with your chair or the dean’s office for the due date), with a letter from the chair providing:

1. Department executive committee approval of the sabbatical plan;
2. A specific outline of the source of support for the sabbatical (colleague coverage, temporary lecturer, or the like), and
3. A brief statement noting the anticipated benefits to the department if the leave is awarded. Deans/Directors will arrange for faculty review of applications from their schools, consider them in light of budgetary resources available, and submit a list of nominees to the Office of Human Resources (166 Bascom Hall) by October 4, 2013. In the case of faculty members with split appointments, the application must be approved and signed by all chairs and deans/directors concerned.

Proposals are then reviewed and evaluated by the Provost’s Office to insure they adhere to campus and system guidelines, and are forwarded to the UW System by the Chancellor. Awards are announced at the December Board of Regents’ meeting and successful applicants will be notified by January 2014.
GUIDELINES
UW-MADISON FACULTY SABBATICAL PROGRAM

Eligibility
A faculty member is eligible for a sabbatical under the following terms.

1. A faculty member must have completed six or more years of full-time service, or its equivalent, in the UW-System and not have taken a sabbatical within the UW-System during the prior six years of full-time service or equivalent.
2. Leaves of absence, regardless of funding source (including personal resources), will be excluded in determining years of full-time service.
3. Preference will be given to those making significant contributions to teaching and those who have not had a leave of absence, regardless of funding source, in the prior four years.
4. A sabbatical will not be awarded to:
   a) a faculty member denied reappointment to a permanent position in the year following a sabbatical leave, or
   b) a faculty member who does not plan to return to the institution from which the leave is granted for at least one academic year of full-time service after the conclusion of the sabbatical.

Types
There are types of sabbatical leaves are available to UW-Madison faculty.

1. Sabbatical leave for a period of up to one academic year (and not cross academic years) and receive from the School/College/Department financial support at any level up to 65 percent of his/her salary for that period, in accordance with the faculty member's school/college policies. Note: percentage of salary compensation may vary from college to college.
2. Sabbatical leave for one semester of an academic year and receive from the School/College/Department financial support at any level up to the faculty member's full salary compensation for that period.

Note: Creditable service for retirement purposes will vary depending on the length of the sabbatical and the level of compensation. A faculty member considering a sabbatical leave request should consult with a fringe benefits counselor prior to submitting a formal request. (Office of Human Resources/Benefit Services – 265-2257)
Conditions

The following conditions govern the UW-Madison program.

1. Salary funds generated by academic year sabbatical leaves, leaves without pay, by personnel turnover, or by personnel reassignment from GPR support may be used to employ, where necessary, temporary replacement instructional staff to maintain the level and quality of instructional services to students.

2. Sabbatical leaves are awarded for the academic and not calendar year. For purposes of the sabbatical program, sabbatical leaves refer to the period of August through May.

3. A faculty member may receive and is encouraged to seek supplementary grants or other awards while on sabbatical, but such compensation, when combined with the amount of institutional compensation, shall not exceed the full compensation normally received from the UW-System for that period.

   However, the faculty member may seek additional support specifically for travel or unusual living expenses incident to the sabbatical program without restriction by the full compensation maximum. If, however, the additional support is from UW-Madison funds, the request must state the source of the additional funding, and the funding chosen must permit the types of expenses anticipated. THE DEAN MUST APPROVE THE REQUEST PRIOR TO THE BEGINNING OF THE SABBATICAL. The Dean has the discretion to approve or deny the request.

   In the sabbatical application, the faculty must specify all grants or other awards applied for that are intended for use during the period of the sabbatical.

4. Such additional grants or awards may be received by the faculty member only if the conditions for accepting the additional resources do not interfere with the stated purposes of a faculty member's sabbatical program.

5. A faculty member may not use the sabbatical to accept other paid employment during the period of the leave, unless it has been stipulated in the application for the sabbatical and agreed to by the Dean/Director. If so stipulated, #3 applies.

6. A faculty member must agree to return to UW-Madison for at least one academic year of service after the conclusion of the sabbatical, or repay any compensation (salary, plus the University's share of fringe benefits) received from the UW System during the sabbatical. (This condition will be interpreted to mean that the faculty shall be in residence as a full-time faculty member at UW-Madison for at least one academic year after the leave in order that the results and benefits of the sabbatical experience can be shared with colleagues and students.)

7. Within three months of returning to UW-Madison, a faculty member must submit to the Department Chair, Dean’s/ Director’s office, and the UW-Madison Provost (attention Laurie Mayberry, 117 Bascom Hall), a written report outlining the accomplishments and it must specifically explain how instruction was enhanced during the sabbatical leave (2-3 pages). NOTE: Fall sabbatical reports are due March 31; Spring and Academic Year sabbatical reports are due August 31.

8. Each faculty member must fill out, sign and submit with the application the Compensation Form and Agreement Form.