The Academic Sabbatical
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When we received an invitation to submit a chapter on our sabbatical experiences, we initially wondered what there was to write about, and what we could contribute, but this invitation led us to reflect on our sabbatical-application process, the actual sabbatical experiences, and the outcomes. Our reflection provided a useful opportunity to critically analyze the value of our different experiences and to provide advice to less-experienced academics about how to avoid the pitfalls into which we fell that could tarnish a sabbatical experience. We draw upon the literature review and analysis from our other chapter in this book to reflect on our sabbatical experiences (in this chapter). We present the policy framework under which we were operating when we applied for our leaves, and then we proceed to two narrative sections that outline each of our sabbatical experiences. Following these narratives, we include a discussion about the lessons we learned and present a set of recommendations that might enhance other academics’ sabbatical experiences.

**Literature Review**

We undertook a systematic literature review, which appears here in chapter 1, in support of our autoethnographies. The review is augmented in this section with consideration of our—the Faculty Association of the University of Calgary—sabbatical regulations.
(TUCFA, 2019, p. 27). Specifically, we explore who is eligible, what is the stated purpose, what is the qualifying period and remuneration details, and what is the application and/or appeal process.

At our university, academic sabbaticals are termed research and scholarship leaves (RSLs) and details about who can access these, when, application processes, the committee who review them, the appeal process, and accountability mechanisms are detailed within the collective agreement (TUCFA, 2019, p. 27). It is important to note that RSLs are different from administrative leaves (see TUCFA, 2019, Article 17, p. 36), which are for academics who have completed a term of five years in administration and are moving back into the faculty professoriate. RSLs only apply to academic staff, including both pre-tenure and tenure, as well as continuing-contract and part-time academics.

The purpose of RSL is “to enhance the quality of the academic staff member as a scholar and as a teacher, thereby assisting the university to achieve greater excellence in its basic areas of responsibility: effective teaching and the advancement of learning” (TUCFA, 2019, p. 27). We thought it was rather odd to include “as a teacher” in the explanatory descriptor given that this leave is about research and scholarship. However, the inclusion of teaching may be due to our university’s more recent emphasis on messaging the importance of teaching, even though the University of Calgary is a research-intensive university. Alternatively, it may be to accommodate and legitimize the scholarship of teaching and learning (SOTL), a more contemporary focus in our university as a result of the implementation of recommendations made by the institutional learning and teaching plan task force (Sumara, 2011), underpinned by the scholarly research commissioned by the task force (Scott & Scott, 2012). Aside from SOTL, this means activities that support graduate students are legitimate aspects of a sabbatical.

A faculty member must have completed at least three years of full-time service to qualify for six months of RSL at the staff member’s academic rank salary, or, alternatively, an academic can wait six years and have either six months at 100 percent salary or twelve months at 87.5 percent of salary. Unpaid leaves of absence may influence an academic’s years of qualifying service (see TUCFA, 2019, section 16.3.1). Another useful condition is that of “First RSL,” where a newly tenured faculty member (one who has successfully and recently achieved tenure at our university) will receive 100 percent of
salary, rather than the usual 87.5 percent. Part-time faculty members can also access RSL; however, these qualification periods are pro rata.

In the education faculty, applying for RSL involves providing a “notice of intent to apply” to the dean between September 15 and October 15 in the year preceding the RSL term. The application includes a research proposal and timeline of activities. The proposal generally encompasses the purpose, research objectives, who you will be working or networking with, what you will be doing, and where. You are also required to identify the direct linkages between your proposed research and the university’s research plan. If you plan to travel overseas to engage with research partners, or to attend conferences or university visits, you must provide a detailed travel plan, including a budget outlining flights, accommodation, per diem, car hires, and any equipment you will need to carry out your proposed research. These documents are submitted to the dean, who then convenes the RSL committee, which review all documentation and make recommendations for or against granting the RSL.

If a faculty member is denied RSL an appeal can be submitted, first to the head of department, then to the dean, and finally to the provost and vice-president academic. This appeal process must be commenced within one week of notification. This ensures that all parties involved in the decisions and appeals are kept informed. However, appeals can be a protracted process and the process can vary across different faculties. It is important to note that the dean holds the right to deny RSL based upon staffing issues or supervision concerns.

Upon completion of RSL, a report of activities and outcomes must be submitted to the dean within three months of their return. It appears that RSL reports vary according to each faculty’s expectations and guidelines.

RSL is a significant benefit to academics in our university; however, there are notes of caution in the collective agreement. For example, a faculty member must return and render service equal to the number of months of the RSL. If a faculty member decides to leave or retire from the university upon completion of RSL, they may be required to pay back the assistance the university paid to them. Another cautionary note is that a faculty member cannot work or receive financial compensation from other sources while on RSL. This seems entirely reasonable given that the purpose is to promote research and/or teaching-related activities and outcomes; however,
this is different to purposes described in the literature, where some were able to work in their field to increase the currency of their knowledge and skills (Gilbert et al., 2007).

Narrative 1: Shelley’s International Research and Study Leave

My academic career commenced in Australia in 1995 as a sessional instructor teaching instructional strategies in my alma mater. For five years I juggled sessional university teaching, teaching high-school students, and leading instructional innovations in the school-district office all while undertaking my master’s and doctoral research. It was mad but engaging, and intellectually challenging. I loved teaching science to high-school students, but I loved teaching adults more. Before I completed my doctorate, I was headhunted by a large business school to establish their quality-assurance and academic-development program at their Australian campus and across thirteen international campuses. This new challenge was exciting and offered me valuable time (one day/week for research activities) to dedicate to my doctoral completion, so I moved into academia full time. Within a year, I achieved tenure and my leadership role expanded. This position involved oversight of numerous professional staff, leading our academic-development department, providing teaching support to my academic colleagues (250+) across six faculties and to our overseas sessionals (500+), and oversight of our business-school “teaching and learning quality-assurance” reporting to thirteen governments.

As a tenured faculty member, my first sabbatical was due at the end of the sixth year; however, I postponed it because my research partner wanted to align her sabbatical period with mine to initiate a significant collaborative project. I really needed that sabbatical; I was tired of the politics, the constant emails, the emotional drain of working with underperforming faculty who were being targeted by their heads for performance management due to poor student evaluations, and the demands of quality-assurance reporting. I was fast approaching burnout and was avidly anticipating the time to engage in research, to enjoy the fun of collaborative scholarly activities, and to travel to conferences and networking with others in my field. Midway through my sixth year I successfully secured a tenured position at a research-intensive university in western Canada. As this represented a promotion to associate professor, better working conditions,
and the opportunity to experience a new country and culture, my family and I were keen to make the move. Unfortunately, this meant I lost my first sabbatical. I was so disappointed as I had been looking forward to the rest and intellectual stimulation of this new project. Even so, the excitement of moving overseas and experiencing a new city, culture, and institution overrode my disappointment at losing my sabbatical.

My second sabbatical was due six years into my term at my Canadian university. However, around that time I was appointed as associate dean, so my sabbatical had to be postponed to take up this leadership role. The challenge of this new role overcame my disappointment of missing my sabbatical. This leadership role was stimulating, presented opportunities to network widely across the province, and offered considerable intellectual challenge in establishing new programs and engaging in entrepreneurial activities to improve the faculty’s finances. I enjoyed two very successful years wherein the fee-for-service and cost-recovery programs I established largely supported the positive recovery of the faculty’s finances, and we established a reputation for being the go-to faculty for unique and tailor-made programming design. Then the dean reorganized his executive team and I resumed my professorial role.

With the pressures of my leadership role, I was well and truly ready for my sabbatical. However, I was shocked to find that because I had not taken my first sabbatical before assuming my leadership role, I had stopped accruing qualifying years. Additionally, because I had not completed the full five-year term as associate dean, I was not due an administrative leave. I was confused and irritated that I had not been so informed. I had made incorrect assumptions, and I had not sought advice at the right time; indeed, I trusted where I should not have. I had no one to blame but myself; I had not read the collective agreement, I had not informed myself of my rights as either an academic or an administrator, and so I missed out.

After eight years of service I was eligible for six-month RSL on 100 percent pay, and there was no pro rata for a shorter term in administration. I could have chosen to take a year at 80 percent salary (in our current collective agreement, this salary reduction has been lifted to 87.5 percent salary), but I preferred to take six months at 80 percent pay and hold over qualifying time for my next leave (by taking the reduced time and reduced pay, but I could not recover my two lost years of accrued years while in administration). This
would align my next sabbatical with Don, my husband, who would be due for RSL. Another stipulation was that I had to spend part of my leave outside of Canada, but I did not see this as a problem, rather as an exciting opportunity to forge useful international networks. Consequently, I set about planning my international sabbatical. I was ready to expand and promote the collaborative research project on university leadership development that Don and I had started a couple of years prior. Our project had not moved forward at the pace we preferred, largely because of my leadership responsibilities.

The Application Process and Documentation

My RSL application involved multiple sections that had to be completed:

1. A proposal with an itinerary and timeline of activities. I proposed to travel to New Zealand (for a week), Fiji (for two weeks), Australia (for three months), and the United Kingdom (for three weeks) to meet with collaborators, present to faculty and graduate students on our findings to date, and analyze our current data and draft at least one paper.
2. Letters of invitation from each university and organization (which specified the dates of my visit).
3. A complete itinerary and detailed budget.
4. Re-allocation of office space during the RSL agreement (this meant that I had to agree to allow others to use my office during my leave).
5. A statement of who was assuming my supervision, including emails of agreement from all eight of my students (to be lodged with the Faculty of Graduate Studies).
6. The RSL research grant application (which included the RSL application and budget) went to the central university research office.

I was fortunate because even though I had a heavy graduate-supervision load (seven EdDs and one PhD student), most of these students were co-supervised by Don, so I was able to get approval to have him assume their supervision during my absence. All students readily agreed to this change because they already had a positive relationship with him and this did not represent a disruption in
support. My leave was approved, and I was advised to apply for the RSL research grant to supplement my reduced income and offset the costs of travel, accommodation, and so on. My grant application detailed all expenses, as well as a new laptop as mine was unreliable and heavy, which was a distinct disadvantage when undertaking six months of travel. The grant funding amounted to the 20 percent of my salary that I was losing. This was approved and I received the funding prior to departure.

New Zealand
My time in New Zealand was both productive and fascinating. I arranged a visit to the University of Auckland and met with the head of the academic-development unit. She organized my visit and was a wonderful host. She was deeply interested in our leadership-development project and indicated her desire to join the project. I presented to faculty and students, and met several faculty leaders. The highlight was gaining insights into how neoliberalism was influencing university policies and how this was impacting academic cultures. It also provided insights into their equity and diversity policies in support of Maori and Pacific Islanders students, faculty members, and staff, and enabled opportunities to compare and contrast New Zealand’s truth-and-reconciliation approaches with Canada’s (Canada, 2015). I was sad to leave but was delighted with the new collegial relationships that had been forged.

Fiji
The next stop was Fiji. Having been born in Fiji, it was great to reach out and network with people in the government and the university. I met with both the dean of the education faculty and the director of the Fiji Higher Education Commission in Suva, both of whom were gracious and hospitable hosts. The director indicated she wanted me to present on both our university leadership-development research and findings from an earlier K–12 assessment study. The government presentations included ministry personnel, school principals, university faculty, and lead teachers. We engaged in productive discussions and problem-solving sessions that focused on a wide range of K–12 and university issues and policies in Fiji. It was so interesting to see the similarities and differences in the education systems in Fiji and Canada. I also presented multiple sessions at the university to faculty members and graduate students on a range of topics related to our
research and to how education programs were structured in each other’s universities. I made myself available to work with doctoral students to provide advice about their topics, potential educational-leadership literature, identified the key gurus in this field, and to simply be a listening ear about the trials and tribulations in their research activities. Faculty leaders and members were extremely welcoming and excellent hosts.

The other delight about my trip to Fiji was that I invited my eighty-some-year-old parents to accompany me so they could enjoy a holiday while I worked. My parents had lived in Fiji from 1958 through 1975 and were thrilled at the opportunity to travel there with me, to return to their old stomping grounds, and visit old friends. During my childhood, my dad had been first an industrial-arts teacher at Suva Grammar School and, later, was approached by government officials to design, oversee construction of, and lead the largest vocational/technical college—the Derrick Technical Institute (then the Fiji Institute of Technology, now the Fiji National University)—which served the entire South Pacific region. We not only spent quality time together revisiting favourite places from my childhood and visiting old family friends, but I also got to hear stories from the past that I had not been privy to as a child. It gave me such rich insights into the life and times of the last British colony and of colonial life, how education had been in the 1960s and 1970s in Fiji, and the diverse and colourful characters who populated the government and institutions of those times. I provided a useful taxi service and took Mum and Dad on visits to the high school and to the Fiji National University grounds. Highlights for Dad included invitations to visit the school workshops during his walking tour through the school. Dad regaled the teacher with stories about the machines he had built which were still in use. The teacher and his students were in equal measures curious and extremely gracious in listening to his stories of the school’s start-up days, fifty years prior. His visit to the Fiji National University was fortuitous as there was a historian who interviewed him at length about his role in establishing the college and his decades-long leadership. Apparently, this historian had been trying to locate and contact Dad for years, only to have him walk into the staff room on his nostalgic tour. Our visit was extremely serendipitous for his research project. It was wonderful for Dad and Mum, who would not have made the trip by themselves, to have this opportunity to accompany me and share
their wisdom while I was engaged in my own academic adventures. We then returned to Australia together.

**Australia**

The Australian leg of my sabbatical was largely based in Perth and Sydney and was equal parts catching up with family while establishing and reaffirming collegial networks. I met with several former colleagues keen to join our international project. Meetings with these colleagues linked our leadership-development project team with others across Europe, so our international team expanded significantly. I also presented on our current and past research to education and business faculty and graduate students. It was also enjoyable to re-establish linkages and to hear of the political, financial, and organizational culture changes to the university scene in Australia.

In addition to time spent networking and presenting, I engaged in serious writing time. I had the opportunity to look after my niece while her parents were away and, with a quiet place to work, I was afforded a number of weeks to analyze data and write up a paper, as well as to get to know her better. The other wonderful aspect of this time was to spend three months of quality time with my elderly parents. This time enabled me to not only write in a quiet place with no interruptions, but also to take on much of the household duties to give my Mum a break and to organize some necessary minor renovations. After four months away, I returned home to Canada for a couple of weeks before heading off to the United Kingdom.

**United Kingdom**

Don joined me for the UK leg of my “travel-batical.” We initially went to London and Warwick to meet up with current collaborators, two of whom had already started their research work in the project and one who had taken a different role and was looking to explore the influence of unionization on leadership and university processes. While in London, Don and I presented on our early findings at a conference in Slough, which resulted in attracting a new collaborator in eastern Europe who was keen to join the project and mirror our approach in her national context. We also met potential new collaborators in Dundee, Scotland. The final stage led us to travelling into the Scottish Highlands, where we leased a rural property for two weeks for the purpose of engaging in a collaborative writing retreat. This retreat afforded us dedicated time to write, develop a grant application,
and to discuss and reflect on the outcomes of the travel-batical. The advantage of this isolated retreat was the intermittent internet, which freed both of us from that constant expectation of email. Our retreat was both productive for our research but also enabled us to relax and unwind, and to plan the next steps in the project.

Accountability and Outcomes
Following our return, I submitted my report on the outcomes of my sabbatical. My report was six pages and included the original purpose and objectives of the RSL, and details of each outcome, and how these linked to the objectives. The feedback I received from my dean was that this was the most detailed and productive RSL report he had seen and he appreciated all my efforts.

One key outcome was that, in the following year, I achieved promotion to full professor. My promotion portfolio was greatly enriched by the outcomes of my RSL, and indeed the linkages I forged were highly advantageous, as one of my overseas contacts served as one of my promotion evaluators. From an affective perspective, I cannot describe how refreshing and delightful it was to have the opportunity to leave behind the constant demands of course-based teaching, unceasing emails, and doctoral supervision (as much as I enjoy working with my students) to engage in intellectually stimulating research activities. The gift of time to quietly sit and read, think, and write was immense and so productive. I love meeting new people, and the friendships and research collaborations I forged have been invaluable to the project and to my doctoral students, many of whom have now joined the project as full collaborators upon completion of their doctorates. Another unforeseen opportunity afforded by our new international networks has been the many invitations to serve as an external examiner for graduate students in Fiji, Australia, the United Kingdom, and South Africa.

Problems
One unforeseen problem was the financial implications of an overseas sabbatical. I noted that in our current collective agreement there is no stipulation regarding overseas travel. Indeed, the expense involved in travelling across multiple countries for five months exceeded the estimates made in the RSL grant application. Additionally, when it came time to submit my tax return, our accountant did not know how to conceptualize the grant funding.
When we contacted our university human-resources department, they were unable to provide clear and specific information about the tax implications of this income. They did supply a letter indicating that this was a grant, but the income created a significant tax issue. I am unsure if this grant was advantageous for the university, as a research metric, but the benefit to the faculty member remained unclear to me; the tax effect was certainly negative.

**Narrative 2: Don and Shelley’s Collaborative Research and Study Leave**

I completed my doctorate in 2009 and pursued contract work and sessional teaching in 2010, as the university sector was suffering the strictures of an economic downturn. In 2011, I secured a tenure-track assistant-professor position, and for the next two years served as the EdD coordinator for the new Leadership in Post-Secondary Contexts program. Shelley served as my faculty mentor and we co-supervised seven wonderful doctoral students. As is common for most academics, my lead up to tenure and promotion was frenetic and challenging in ensuring my teaching, research, and service responsibilities were exemplary, and outputs were considerable as well as high quality. In addition to the work pressures, during my pre-tenure term I had been diagnosed with muscular dystrophy and I was also found to have an unrelated spinal stenosis. The spinal stenosis confined me to a wheelchair and left me in excruciating pain. I finally had surgery to correct the stenosis, but these medical issues created their own pressures in terms of loss of research productivity, which added psychological pressures in the lead up to applying for tenure and promotion. In 2016, I was fortunate enough to achieve both as an associate professor. I was more than ready for the break that RSL offers, but in consultation with Shelley we decided that I would be best to wait to align our RSL timing so we could undertake a collaborative one. Consequently, we submitted a joint RSL application to address both the collaborative nature of our project and my new need for assistance in international travel.

We planned a joint six-month travel-batical, to include two overseas trips, one to Australia and one to the United Kingdom, to work with our scholarly partners in each country. Even so, our major objective was to analyze data and complete at least one journal article. In our joint proposal, we ensured we linked our project
and our RSL objectives to our university’s research plan, specifically related to promoting collaborative research activities. We discussed RSL plans with our doctoral students, and asked two caring and conscientious colleagues if they would be prepared to assume our supervision loads during our RSL. Both our students and colleagues were happy with this shift of supervision.

Mirroring Shelley’s earlier RSL application, we completed the requisite paperwork and submitted both applications to the RSL committee. Our first indication of problems emerged when we were invited to a meeting with a member of the executive team in our faculty, who informed us that the RSL committee had denied our applications. Naturally, we wanted to know why. An odd conversation unfolded; they were cagey and refused to provide the committee’s rationale, but they indicated that there had been concerns about a husband and wife taking a joint leave. We questioned the committee’s stance, as recently we had had to consult human-resources to obtain a ruling regarding various administrators’ perceptions that Shelley and I working together (i.e., working together with our students, being collaborators in our joint-research, and even our involvement on doctoral committees) entailed a conflict of interest. We reminded the administrator that we had sought and received a clear directive from the university that, as our employer, they perceived us not as a married couple but as separate employees who happen to be in the same specialization; thus, our working together and/or being research partners did not constitute a conflict of interest. They hastily agreed and indicated that the decision to deny our leave was to be overturned, we would be granted our joint RSL. This contretemps left both of us feeling disturbed and disappointed, which was an inauspicious start to what should have been a much-anticipated sabbatical.

Further to the administrator’s communication, the dean contacted me and said that the colleague who had kindly agreed to serve as supervisor for my graduate students was too junior and overloaded, and so I was required to maintain my supervisory responsibilities while on sabbatical. Given that our colleagues in the leadership specialization are overloaded all the time, with supervision loads rarely lower than five students per supervisor (some colleagues supervise nine or ten students), this rationale meant that it was unlikely that any of us would ever be able to take a sabbatical without a supervision load. Consequently, both Shelley and I had to
continue our supervision with a combined group of fourteen students. Given that most of our students were in the same cohort and were fast approaching candidacy, retaining their supervision meant a significant additional load while on sabbatical. As our notification of approval came through, I received a further option from the dean that enabled me to extend my sabbatical from the initial six-months to a year because I had recently achieved tenure. Extensions to RSL for newly tenured faculty members was a new condition in the collective agreement in recognition of the stress involved in applying for tenure and promotion; hence, I readily took up this option to extend. Unfortunately, this was not available to Shelley, which did not leave her with feelings of joy or jubilation.

How Plans Go Awry
We commenced our sabbatical in January and started making plans to travel to Australia and the United Kingdom; however, it quickly became clear to us that the constant demands of our students were not likely to abate. We started meeting with them online. When we considered our finances at the time (our son had decided to get married mid-year), we came to the conclusion that a “travel-batical” was not financially viable; we opted for a “staybatical.” We worked on two different papers, presented at two conferences, and met with our partners through synchronous technologies, but the vast majority of our time was taken up with meeting with students, running collaborative sessions for the students, and reviewing their proposals or final chapter drafts. A wonderful outcome was that all our students met their milestones in a timely manner and we maintained our close relationships with all of them; however, during the initial six months it was by no means either research productive or relaxing. Shelley returned to teaching more exhausted than she started. She was also deeply frustrated that we had made such little progress on our research-project objectives.

I continued on in the second half of my sabbatical, and Shelley assumed most of my supervision load. This provided me with time to work on our project, but it remained difficult to have the time to collaborate and co-author with her; hence, my research productivity was deleteriously affected because so much of our planned analysis and writing was to be collaborative and she simply did not have the time. I did use the time to integrate much of the literature that I read into my course-based teaching, and I shared many papers I
had found with my students as they pertained to their research topics; hence, I did engage in SOTL. I did make time to walk regularly, which aided my recovery from the spinal surgery, and I was able to take on more of the home duties to alleviate some of the pressure on Shelley, but I too found working alone, in our usually collaborative project, a little miserable and largely unproductive.

**Highlights and Lowlights**

Overall, the highlights of the sabbatical were the time we managed to carve out for our collaborative discussions and online meetings with our partners, and seeing the success of our incredible students. The non-academic outcomes for me included recovering from the frantic pre-tenure pace and getting time to aid my recovery from surgery. I enjoyed the dedicated time that Shelley and I had for our research, although simultaneously I resented the necessary interruptions we experienced due to the demands of supervision. The supervision dimension presents feelings of conflict for me. I enjoy working with my students, and revel in their success, but I remain aware of the time these supervisory activities demand and take away from my research. This lost research time ultimately impacts my performance-review metrics.

Shelley and I submitted a joint report when she returned and I submitted a further report at the completion of my RSL. We noted the deleterious impact that maintaining our students had had on our research, but we did not receive any comment other than “thanks for submitting your report.” Upon reflection, the staybatical was an excellent option when finances were tight, but it must be noted that remaining at home can conversely result in too many distractions; students expect you to be constantly available to them because, from their perspective, “nothing has changed.” Finally, the mental-health break generated by change in usual routines that is afforded by travelling does not occur.

**Discussion and Lessons Learned**

In this section, we discuss how our experiences compared to other published accounts about sabbaticals and provide advice regarding how to get the best out of this academic activity. We distilled seven key points, depicted in figure 12.1.
Given the intensity of academic life, particularly for those who are working in research-intensive institutions, a sabbatical is a godsend to be released from the constant demands of teaching and service in order to concentrate solely on research activities (Davidson et al., 2010; Hedges, 1999). This was a common theme in the literature, and it highlighted the tensions between research and teaching in universities (Bai & Miller, 1999; Maranville, 2014; Marker, 1983) and how excellence in research does not necessarily translate into quality teaching and learning (Prosser, 2010; Prosser et al., 2008; Serow, 2000; Wernick, 2006). Therefore, we recommend new faculty members learn about, and take advantage of, their university’s sabbatical policies (Else, 2015; Smith et al., 2016) to ensure their productivity remains high and they take a mental- and physical-health break. Given contemporary concerns with health and well-being, the value
of sabbaticals is greater than simply research (Blum, 2007; Lakkoju, 2020; Parkes & Langford, 2008).

Scholarship of Teaching and Learning as a Legitimate Sabbatical Dimension

We noted that for many institutions sabbaticals also encompass SOTL. This can produce positive outcomes for institutional programs and students (Gilbert et al., 2007; Miller & Bai, 2006; Sima, 2000). This broader conceptualization of research is important as many academics actively research teaching, learning, and assessment. To deny this as a valid research topic would be inappropriate, especially given the priority that all universities place on enhancing the quality of student outcomes. This is particularly important because in some research-intensive universities SOTL remains a lesser priority, or a secondary research area, to that of research in the discipline when considering tenure and promotion criteria (Parker, 2008); happily, this is starting to change (Subbaye & Vithal, 2016). Additionally, legitimizing presentations and workshops for graduate students is important (Delany, 2009; Halbert, 2015). We would also recommend that part of the accountability mechanism should be to share research outcomes with students, either through presentations or through integration into curriculum.

Become Empowered—Read Your Collective Agreement and Seek Advice!

One source of frustration for us was a lack of clarity surrounding RSL regulations. It was noted in the literature that many academics do not know they can take a sabbatical, or that they fear repercussions in stepping away from their role for a period and so forego one (for a deeper exploration, refer here to ch. 1; see also Friedman, 2018; Leung et al., 2020; Stelfox et al., 2015; Straus & Sackett, 2015). We would urge academics to empower themselves with the knowledge of their collective agreement, as these contain the rights and responsibilities of a faculty member. Human-resource partners are there to help with providing clarity and advice in this dimension of academic life. It is also important for universities to provide clear guidelines or academic workshops providing faculty members with detailed information about the processes, expectations, accountability, and tax implications of sabbaticals (Sima, 2000).
Clear Your Desk!

Few authors mentioned the complexity of maintaining doctoral students during a sabbatical (Gilbert et al., 2007). Indeed, our two different experiences of sabbatical pressed home the importance of transferring supervision of students to colleagues, when possible, in order to maximize the positive impacts of the sabbatical; that is, to have dedicated time for research and to have a rest from the constant demands of work and students. Of course, the risk in transferring your graduate students to a colleague is that students may feel rejected, or they may develop a greater affinity for your colleague and request to make the move permanent. If a faculty member loses students to their colleagues due to taking a sabbatical then all preceding supervision time and effort, and intellectual input invested to that point, is lost and is not recognized, particularly given that doctoral completions are the only metric of graduate-supervision activities. This is particularly important with students approaching the final stages of completion. Therefore, faculty members face an important dilemma: to maintain student supervision (and positive relationships) for the important metric and take the loss in sabbatical productivity or transfer their student with the associated risk of losing a supervision metric but gain sabbatical productivity (Burton, 2010; Halbert, 2015).

Travel-batical vs. Staybatical

There are pros and cons of a travel-batical compared with a staybatical (Smith, 2020). The advantages of a travel-batical are many. In terms of research it includes networking with colleagues in other institutions or organizations (Benshoff & Spruill, 2002; Sima, 2000), getting away from your home or work office, experiencing a change of pace, and intensively working with research partners with no distractions or interruptions. In terms of the personal dimensions it includes the opportunity to meet new people, see new places, eat different food, experience and appreciate other cultures, and identify the positive aspects of home (Friedman, 2018; Gallagher, 2018). The disadvantages relate to the expense of travel and accommodation, which can be significant if family accompany the sabbaticant, as well as the greater planning and documentation that is required.

The advantages involved in a staybatical include minimal financial impact; quality time spent with family, particularly aged parents if they are unable to travel with the sabbaticant; few disruptions
to routines and work space; access to resources within the faculty; less requisite documentation; and with the COVID-19 pandemic, it is a considerably safer option to that of taking flights and living in a country that may not have a sound healthcare system (Marshall, 2014; Smith, 2020). The disadvantage to a staybatical is the temptation and/or expectation to continue juggling usual academic responsibilities, maintain timely email responses, and not secure your freedom from faculty meetings and other duties because you are present. Additionally, a staybatical will mean forgoing an enriching cultural experience, which promotes greater understanding of international literature and the value of international networking, crucial for promotion to the full-professor ranks. Therefore, faculty members need to weigh the pros and cons and decide what is right for them.

*Use the Time Wisely!*

While the literature highlights the advantages of slowing down, resting, and deriving intellectual stimulation and revitalization from changing mental gears (Swenty et al., 2011; Wilson, 2016), there is a danger that a sabbatical may become derailed or wasted if a faculty member is not disciplined in using this precious time to write and engage in associated research activities. Consequently, it is important to remain mindful of your university’s accountability mechanisms, wherein you will be required to report on your sabbatical outcomes (Industrial Relations News, 1963). As Miller et al. (2012), Spencer and Kent (2007), and Gilbert et al. (2007) indicated, university leaders should ensure they follow through with clear accountability processes so a response can be made to critics of sabbaticals as an unwarranted “perk” within the academy (Sima, 2000).

*Leaders: Mixed Messaging and Discriminatory Decisions*

In our situation, which we admit may be a rarity, it is important for leaders to consider the alignment between the university’s research missions and goals and approval of sabbatical objectives. Our research proposal overtly articulated our sabbatical application’s alignment with the university’s mission for increased collaboration in research as well as the desirability for international research, and yet when it came to the approval process, collaborative activities were not perceived as appropriate. Additionally, the literature highlighted gender discrimination as prevalent. In our case, there may have been discrimination related to marital status. Therefore, faculty members
should challenge decisions that appear to be discriminatory (Smith et al., 2016) or incongruous with university priorities. This links to the point about empowering yourself through knowledge of the collective agreement and university policies, and being prepared to push back on flawed decisions.

**Conclusion**

This chapter explores two academics’ narratives of their sabbatical experiences. One was an international sabbatical and involved travel to four countries, collaboration with existing research partners, forging new partnerships and networks, and presentations and workshops with faculty, students, and government personnel. The second sabbatical was a staybatical designed to get data analysis and writing completed. The pros and cons of each type of sabbatical were analyzed and compared in relation to the literature. Seven key points were revealed as the lessons learned, which are highlighted in figure 12.1 and discussed in the “lessons learned section.” These seven lessons outline key considerations that are crucial to maximize the impact of a sabbatical while avoiding the pitfalls we encountered in our own sabbatical experiences.

Overall, we strongly advocate for sabbaticals as crucial opportunities for research and to progress international projects. Given the intensity of academic life and work, we refute the claim that sabbaticals are a perk, which is largely undeserved, for academics who enjoy cushy positions in the ivory tower. Indeed, we contend that sabbaticals are essential antidotes to the depredations of managerialist universities, that they are a way for faculty members to achieve intellectual revitalization and to remain academically productive, pedagogically innovative, research active, and—probably most important—emotionally and physically well balanced.

**References**


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