THE CALIFORNIA STATE COLLEGES
Office of the Chancellor
5670 Wilshire Boulevard
Los Angeles, California 90036

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FSA 69-30

To: State College Presidents
   State College Librarians

From: C. Marshall Keene
      Assistant Chancellor
      Faculty and Staff Affairs

Subject: Sabbatical Leaves (Librarians)

Recently enough questions have been raised concerning the eligibility of librarians for sabbatical leaves that it may be useful to detail the history of this subject.

When the personnel rules were adopted by the Board of Trustees in January 1962, among the important policy changes made were the following: (1) librarians were designated as academic employees (in the closely related category)—this was reaffirmed by action of the Board of Trustees on December 7, 1962; (2) librarians (as well as executive and academic administrative personnel) were designated as eligible for sabbatical leaves; and (3) the limitation of those able to take sabbatical leave in any of the eligible categories in any one year was set at 5% of those in each category—Assistant Professors and above in the faculty category. (Previously, only 5% of those faculty members with sufficient service to take sabbaticals could take them in any one year—this meant that an individual faculty member with six years qualifying service might have to wait 20 additional years to take a sabbatical—only 84 or 1.9% of the regular full-time faculty were able to take them in 1961-62. Also, previously, those taking difference in pay leaves were paid the difference between each individual's salary and that of his replacement—under the new rules the amount of difference in pay was set as the difference between the individual's salary and that of a "hypothetical" replacement at the first step of the salary range for Instructor.)
All of these changes plus an increase in the funds appropriated for the purpose resulted in an immediate increase in those taking sabbatical leaves—131 or 2.7% of the full-time regular faculty (although some librarians and academic-administrators were included in those taking leaves both in 1962-63 and 1963-64).

Unfortunately, because of the desire to hold the total support budget to $105 million in 1963-64 only the same number of sabbatical leaves, 131, were available in 1963-64 or 2.5% of the regular full-time faculty. We were unable to get an augmentation increase included in the budget submitted to the Governor. (A memorandum dated August 3, 1962 from the then Chief of Budget Planning in the Chancellor's Office to the then Vice Chancellor, Business Affairs includes the following: "Mansel Keene said that [increased] funds for this purpose [sabbatical leaves] should be included in the budget. Six colleges asked for $276,483 to implement this law change. If all colleges asked for funds, we would have an [augmentation] item totaling $500,000. In our earlier discussions . . . we did not see how this could be included in a high-priority category, so it is not programmed in the $105,000,000 budget."

However, $200,000 in program augmentation for sabbatical leaves was included in the Governor's budget for 1964-65. The following comments concerning the changes in the personnel rules which became effective in July, 1962, were included in the Governor's Budget, 1964-65:

"The new rules essentially provide for two changes, (1) the base upon which the eligible group is determined has been expanded to the total number of faculty at any given college, and (2) the group eligible for the sabbatical leave program has been expanded to include executive, administrative and librarian classes.

"This budget provides for the first of the two changes adopted by the Trustees of the California State Colleges, that of expanding the sabbatical leave program for the faculty. There are now approximately 6,000 faculty members in the college system, 5 percent of this total, or 300 individuals, would be entitled to participate in the new sabbatical leave program next year if they have sufficient tenure.

"The funds provided in this budget will allow implementation of approximately 50 percent of the program expansion for the teaching faculty."
The Legislative Analyst in commenting on the sabbatical leave augmentation item for 1964-65 supported it, but in his comments which covered more than one page of his report (pages 275-276) are the following observations:

"The total amount requested for 1964-65, including both augmentation and workload funds, will provide for about 50 percent of the estimated maximum cost of the new program. We believe that the amount requested for faculty is fully justified. The granting of sabbatical leaves to faculty members for every seventh year of service is well established for public, as well as private, colleges and universities across the country.

* * *

"We do not believe, however, that it is either necessary or appropriate at this time to extend sabbatical leave privileges to librarians and administrative personnel. If this were to be done, it would be difficult to justify not extending similar privileges to librarians and administrative personnel throughout the state service. We do not find any particular significance, in this respect, in the fact that such persons are employed in the state college system rather than some other state agency.

"We therefore recommend that this item be approved in the amount requested with the condition that sabbatical leave privileges be limited to teaching faculty only."

Efforts were made during the legislative session to get the limitation on those who could take leaves removed—these were not successful. (The funds appropriated allowed 193 or 3.3% of the regular full-time faculty to take sabbatical leaves in 1964-65.)

Sabbatical leave funds for 1965-66 were increased to allow 247 or 3.9% of the regular full-time faculty to take them that year. However, the restriction on who could take them remained in effect despite efforts to have the restrictions removed.

When the budget for 1966-67 was under consideration a further step was taken during the budget review process in Sacramento to restrict those who could take sabbatical leaves. While up
to that time sabbatical leaves could be taken by any class and rank personnel with sufficient qualifying service and to the extent funds were available. However, in May 1966 the then Assistant Chief Budget Analyst of the Department of Finance wrote the Vice Chancellor, Business Affairs to confirm the program which the Vice Chancellor had been able to achieve:

"This will confirm our agreement of May 3, 1966, regarding the definition of teaching faculty, which we reached in relation to the 1967-68 fiscal year and thereafter. It was my understanding that we agreed to define those persons who would be eligible for sabbatical leaves, under the teaching faculty definition, as those persons occupying a class and rank position where the person being considered had taught at least one quarter time on the average for each year of eligibility considered for the granting of a sabbatical leave."

On May 13, 1966, this further restriction in those eligible for sabbaticals was communicated to the Presidents in FSA 66-25. We advised the Presidents in this communication that leaves already approved for 1966-67 for non-teaching personnel in class and rank position who did not meet the new criteria could be taken.

The Legislative Analyst in his comments on the 1966-67 budget recommended a reduction of $21,183 in the augmentation funds because of the 5% limitation in Title 5. (This limitation was removed in the July 1966 revision of Title 5.) He also reiterated the fact that:

"Further limitation has been established by the Legislature in recent Budget Acts to the effect that funds will be provided only for sabbaticals for full-time teaching faculty."

The Governor's Budget for 1967-68 states in connection with an augmentation of $106,800 for sabbatical leaves:

"The augmentation is distributed in accordance with the number of eligible faculty at each college adjusted by the number of leaves which is printed in the 1966-67 Governor's Budget."
The Legislative Analyst comments negatively in his review of the 1968-69 budget about the change to two-thirds pay for a year’s leave (made in July 1966) to accommodate more readily to the change to quarter system year-round operations:

"We believe that the state colleges have reversed their priorities in this policy area by granting additional compensation before increasing the total number of leaves. It is noted that there is currently a backlog of 2,575 faculty members eligible for leaves and that the budget provides for only 166.5 full-year leaves at a cost of $1,574,055 . . . Our conclusion is that the $237,232 requested should not be allowed for the purpose of increasing faculty leave compensation but that consideration should be given to the possibility of appropriating the funds for an increase in the total number of leaves at the existing budgetary levels."

The Board of Trustees requested a program augmentation of $964,211 for additional sabbatical leaves for 1969-70. This was reduced to $197,110 in the Governor's Budget.

The Legislative Analyst in his report recommends the deletion of this amount in an apparent reversal of his position of the previous year, see above, where concern was expressed about the backlog of eligibles. The "limitation . . . established by the Legislature in prior Budget Acts to the effect that funds will be provided only for sabbaticals for full-time teaching faculty" was again included in his comments.

As a continuation of our efforts, we are currently requesting the Legislature in our sub-committee hearings to place language in the budget act which would include librarians in the sabbatical leave program.

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