



SABBATICAL POLICY

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1. Introduction

- 1.1. The OWN Trust is committed to providing employees with a work-life balance and offering opportunities to retain experienced and competent members of staff to enable the constant delivery of high quality education.
- 1.2. Sabbatical leave is an extended period of authorised unpaid leave. This policy covers which employees are eligible, provides an overview of the process for applying for sabbatical leave and important information for employees to consider when applying for a period of sabbatical leave.
- 1.3. Sabbatical leave is not an entitlement, but the Trust recognises that for employees to balance their work with other aspirations, commitments and responsibilities during their career, there may be circumstances where it may be beneficial to the member of staff and the Trust to allow an unpaid period of time away from work, for example, to undertake further education/study or travel.
- 1.4. The purpose of sabbatical leave will normally be linked to an employee's personal development outside their employment, allowing the employee to return to work with enhanced skills and ideas. The employee must set out their reason as part of their application in order for the Trust to properly consider the request.

- 1.5. Each request will be considered on a case-by-case basis taking into account all the individual circumstances and will be subject to approval from the Trust.
- 1.6. The Trust will consider any such request and any period of sabbatical leave, where granted, will be entirely at the Trust's discretion and with such conditions as the Trust considers appropriate.
- 1.7. This policy is non contractual and may be subject to review, amendment or withdrawal at the Trust's discretion upon reasonable notice.

2. Eligibility

- 2.1. Employees will be eligible to apply for sabbatical leave at any point after they have completed any relevant training or induction (e.g. Early Career Teachers), with decisions made on a case by case basis and based on the business needs of the Trust.
- 2.2. Both full-time and part-time employees with the relevant service are eligible to apply. Casual/relief/agency staff will not be eligible to apply for sabbatical leave.

3. Applying for sabbatical leave

- 3.1. Any eligible employee wishing to make an application for sabbatical leave should do so on the form at Appendix 1 stating:
 - the proposed objectives;
 - the proposed duration of the sabbatical leave (normally between one month and one year); and
 - the perceived benefits for the Trust and the employee.
- 3.2. The form should be submitted to the Headteacher of each OWN Trust academy. For applications by the Headteacher the form should be submitted to the Chair of the Local Governance Committee and the Trust Board.
- 3.3. Applications should be submitted at least one term prior to the requested sabbatical start date.

4. Considering the request

- 4.1. Each application will be considered and assessed by the Trust on an individual basis taking into account a range of relevant issues including but not limited to:
 - Workload implications for colleagues
 - Ability to recruit cover where necessary
 - Financial implications

- Impact on quality and level of education delivery
 - Potential benefits to both the member of staff and the Trust
- 4.2. Consideration of the Trust's ability to continue to deliver a high standard of education during the period of absence will be paramount.
- 4.3. If a request is refused the member of staff will be notified of the reasons for refusal and of their right of appeal. If a request cannot be accommodated but an alternative arrangement (e.g. a different/shorter duration or different dates would be acceptable) is proposed by the Trust this will be communicated to the employee.
- 4.4. The approval section on the sabbatical request form should be completed and signed and a copy of the form will be provided to the employee.
- 4.5. The request for sabbatical leave and a copy of the decision will be placed on the employee's personal file.

5. Arrangements during the period of sabbatical leave

- 5.1. During any agreed period of sabbatical leave the employee will be unpaid and the contract will be suspended, which means there will be no entitlement to contractual benefits for the duration of the sabbatical. However, the employee's continuous service will be preserved.
- 5.2. Employees will return to work after their period of sabbatical leave at the salary level applicable immediately prior to the period of authorised leave. The performance management process will be suspended during the sabbatical period and will resume once the employee returns to work.
- 5.3. The employee is required to keep up to date with any relevant developments in their profession/area of work, professional training, accreditation needs, including attendance at specified training/development courses to ensure they maintain their professional registration/membership, and to provide any necessary evidence of such on or prior to their return to work.
- 5.4. The employee will not be permitted to take up employment or provide any consultancy services during any agreed sabbatical leave without the prior written permission of the Trust. All Trust policies will continue to apply for the duration of the sabbatical, including but not limited to, the Code of Conduct, Disciplinary Procedure and safeguarding/Child Protection.
- 5.5. The employee will be required to keep in contact with the Trust and individual academy whilst on sabbatical leave on a fortnightly basis as agreed prior to the start of the sabbatical period.

- 5.6. There is no entitlement to annual leave during the sabbatical period as the contract is suspended. For support staff contracted to work for 52 weeks, any accrued but unused holiday entitlement for the current holiday year must be taken prior to the start of the employee's sabbatical leave.
- 5.7. If the employee wishes to terminate their employment during sabbatical leave, they must do so by giving the written notice required according to their contract of employment.

6. Impact on pension

- 6.1. When a Pension Scheme member has authorised unpaid leave of absence, the period of any such leave will not count as pensionable service. Employees are responsible for making their own enquiries about the impact on their pension and for making any arrangement they may wish to buy back the period.
- 6.2. Relevant information can be accessed via the Local Government and Teachers' Pensions Schemes:

<https://www.lgpsmember.org/arm/already-member-extra.php>

<https://www.teacherspensions.co.uk/members/working-life/paying-in/increasing-your-pension/additional-pension.aspx>

7. Return from sabbatical leave

- 7.1. Prior to the employee's return to work, they will be expected to attend an appropriate re-induction meeting to ensure that the employee is able to effectively fulfil the requirements of the role immediately on return to work.
- 7.2. Any training needs will be discussed and agreed with the employee depending on the length of the sabbatical period.

8. Varying the duration of the sabbatical leave

- 8.1. During the period of sabbatical leave, a request for the period to be varied (either extended or reduced) must be made in writing (by letter or by email) giving a minimum of 1 month's notice.
- 8.2. An earlier or later return to work may be accommodated only where it is possible for the Trust to make suitable arrangements for this and such requests to vary the period of leave will be considered on a case-by-case basis.

9. Failure to return from sabbatical leave

- 9.1. Failure to return to the academy at the end of the sabbatical period, without seeking a variation to the sabbatical period, will be regarded as unauthorised absence and will be managed in line with the Trust's disciplinary procedure.

10. Appeal

- 10.1. Employees have the right to appeal against a refusal to approve a sabbatical request. Appeals should be submitted within 5 days of receiving the decision.
- 10.2. Any appeal lodged against a decision relating to a sabbatical request will be heard by a Staff Appeals Committee of the Local Governance Committee or Trust.
- 10.3. The employee and their chosen representative (normally a representative from a recognised trade union or work colleague) may attend any such appeal meeting to make representation.
- 10.4. The decision of the Staff Appeals Committee will be final.

11. Data Protection

- 11.1. When an employee makes a request for a sabbatical under this policy, the Trust will process any personal data collected (including written records of meetings held under this process) in accordance with its data protection policy. In particular, the Trust will only record personal information required to deal with the employee's request for sabbatical leave and keep this information only for as long as necessary to deal with the request. Data collected as part of a sabbatical request is held securely and accessed by, and disclosed to, individuals only for the purposes of responding to sabbatical requests.
- 11.2. On the conclusion of the process, data collected will be held in accordance with the Trust's retention schedule. Inappropriate access or disclosure of employee data constitutes a data breach and should be reported in accordance with the Trust's data protection policy immediately. It may also constitute a disciplinary offence, which will be dealt with under the Trust's disciplinary procedure.

APPENDIX 1 – SABBATICAL REQUEST FORM

Name	
Position	
School	

SABBATICAL REQUEST

I wish to apply for a period of sabbatical leave.

Proposed duration of sabbatical leave:

Proposed date(s) of sabbatical leave requested:

From.....To.....

Reason for sabbatical leave:

Please give details including your proposed objectives during the sabbatical period requested, the reason for the duration requested and details of any perceived benefits to the Trust of granting this request*

Declaration

I understand that if my sabbatical request is approved, this will affect my pension and that I am responsible for obtaining information and for making any arrangements in relation to my pension.

I have read the Sabbatical Policy and understand and agree to the terms contained therein.

I understand that any agreed period of sabbatical leave will be unpaid.

I confirm that I will agree to notify the Trust of any events that may affect my employment that occur during my sabbatical leave.

Signed:.....Date:.....

DECISION BY HEADTEACHER/LOCAL GOVERNANCE COMMITTEE/CHAIR OF TRUST

Sabbatical Application received from:

APPROVED Duration of sabbatical: Start date: End date: Contact arrangements:	NOT APPROVED
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Reason for decision:

Signed:

Dated:

Appeal

You have the right to appeal if your request for sabbatical leave has been refused. You should submit any appeal in writing, indicating the grounds for your appeal, within 5 (working) days of receipt of this decision.