The Practical Guide to Sabbatical Planning

The following information has been compiled to assist Western Faculty Members who are taking a Sabbatical, either within Canada or abroad. The information in this document is provided only as guidance and should not be construed as official policy or inclusive of all matters to consider when preparing for a Sabbatical. This information is also subject to change.

ADMINISTRATIVE/UNIVERSITY ISSUES

1. Research Western

Please contact Research Western to determine appropriate actions with any grant holdings. Please notify the Director Research Services at (519) 661-2111 ext. 85172 or nwu28@uwo.ca

Sabbatical/Research Leaves (paid or unpaid) of more than one year must be reported to the TriAgency by the Awardee and RD&S. The TriAgencies require at least one year between two sabbatical/research leaves for a grant to continue.

2. Departmental Chair

Please ensure that discussions have taken place between you and your Departmental Chair to discuss supervision of Laboratory, graduate students, or staff, if necessary.

3. Employment Confirmation Letters

Please contact the Office of Faculty Recruitment and Retention (OFRR) for a letter confirming your ongoing employment at Western University. This letter may be necessary when applying for any required immigration documentation if applying for a Sabbatical abroad.

Contact Information:
Faculty Recruitment Office

4. Parking Office

Contact the parking office to return your pass and stop parking payments for the duration of your leave.

5. Western International

Western Worldwide dashboard may assist faculty members who are in the middle of identifying possible partner institutions – it lists Universities around the world with whom Western has a formal agreement/partnership, whether related to research or student mobility.

If you select “International Agreements” in the first drop down menu, you can then either click on the pins on the map or sort the list by country.

6. Alumni Branches for Western University:

Take advantage of Alumni Branches for Western University that are located at both national and international locations:

Western Alumni (westernu.ca)

7. **Removal Expense Request Information:**

Sabbaticants may apply to have a portion of their salary segregated for moving expenses. Individuals are generally considered to have moved (changed residences) when their new residence is established as the place at which they ordinarily reside as a result of moving themselves, the members of their household, and their possessions. More information can be found at Removal Expense Request - Sabbaticants - Research Western - Western University (uwo.ca)

PREPARING FOR YOUR LEAVE

1. **Financial Institutions**

Although automated debit and credit machines may make it easier to access personal bank accounts, accessibility is not guaranteed at smaller locales if traveling outside of Canada. Ensure that you have access to local currency and/or U.S. dollars if traveling abroad.

Notify your financial institution that you will be traveling abroad to ensure that you have full access to your funds. Failure to notify your bank that you will be accessing your credit card in another country, may result in the bank identifying that your credit card has been stolen and it is being used elsewhere.

Contact your financial institution to see if there is a partnering institution in the geographic area to which you will be traveling. Having access to a partnering institution will assist with access to bank accounts and travellers cheques. Also, research the currency exchanges between financial institutions as different institutions have different rates and policies. Some credit cards will also carry additional medical and travel insurance.

It is also important to ensure that your financial institutions are aware of departing and return dates. If a purchase is made using your credit card in another country, your financial institution will contact you using your home contact number. If your financial institution is unable to contact you regarding your credit card purchases, they may freeze or suspend your credit card, as the purchases will not align with your normal purchase pattern.

2. **Identification Documents**

Ensure all documents used for identification are up to date. Plan now as it takes time to renew passports and other identification documents.

Photocopy all identification documents in case of lost or stolen property including:

- Passports
- Work permits
- Travel visas
- Permanent Resident Card
- Airfare and other transportation documentation
- OHIP card
- Additional health insurance

Take a copy of the above documents with you in case any problems arise and leave a copy at home which can be accessed quickly in case of an emergency.

3. Home Rentals

If you choose to rent your home while on sabbatical, please ensure that you have entered into a proper lease agreement and that you recognize your role as a landlord. More information on this topic is included below under "leasing."

Ensure that you understand insurance implications when renting your home including insurance requirements, car insurance, fire insurance and theft insurance.

a. Advertising:

It is advisable you advertise your home at least 6 months – 8 months prior to your departure. The Office of Faculty Recruitment and Retention will advertise your home on the Sabbatical page of the Recruitment website and will also circulate your listing as appropriate to incoming visiting faculty members and new full time hires. In addition, the following websites will allow you to reach a broader academic audience to advertise your home:

- SabbaticalHomes.com - Academic Home Rental Exchange Sitting - est 2000
- AcademicHomes.com - Sabbatical homes for rent, for sale, for exchange, or for sitting.
- Faculty Recruitment and Retention Sabbatical page
- MedsHousing - Global Housing for the Medical Community

b. Leasing

If leasing your home while on sabbatical, it is important to understand and adhere to your obligations as a landlord. Review the Residential Tenancies Act to understand what is required of a landlord and tenant under Ontario law:
Residential tenancies Act

Also ensure you protect both your rights as a landlord and the rights of your tenant by outlining all aspects of the rental agreement.

Sample lease agreements

Property Insurance
There is usually an additional cost to insure your home as a rental property during your sabbatical. It is extremely critical to notify your insurance company well in advance of your departure to ensure you are able to retain your insurance. Some insurance companies may refuse to insure your household effects or your home. Familiarize yourself with your coverage to ensure there are no surprises. You may want to research **rented dwelling insurance or short-term renter's insurance** for information.

c. Property Protection

It is advisable to take photographs of each room in your house and remaining personal property prior to your departure. This is to ensure some protection for the homeowner if anything is damaged, broken or misplaced during your absence. The homeowner is responsible for all maintenance and upkeep including lawn maintenance and snow removal. It may be advisable to designate a friend/trusted handy person in your lease to be a contact person in case of required repairs or maintenance. This individual may also check on your home to ensure that there is no damage or disarray. Another option is to make arrangements with a property management firm.

Prior to renting, specify areas of the house that cannot be repainted or remodeled in any way and notify all personal utilities and monthly services of a change of name and call in the final reading prior to your leave.

d. Contact Information for Personal Utilities

Below are some contact details with the City of London:

Electricity
London Hydro
519.661.5503

Heat
Union Gas

Water Heater Sales/Rentals
Union Energy

Phone Connection, Cell, Cable & High Speed Internet
through Bell Canada

Phone Connection, Cell, Cable & High Speed Internet
through Rogers Canada

e. Rental Income Tax Guide

The following link from the Canadian Revenue Agency (CRA) is useful in providing information on the eligible deductions from rental income (e.g. all repairs required to maintain the rental property are deductible from the gross rent. Insurance, property taxes, utilities, and interest on mortgage payments are deductible from rental income).

Prior to your departure, it is advisable you consult a tax accountant to ensure you understand all possible deductions, implications and necessary documentation required to provide to CRA when you file your income taxes.

Moving

1. Children and Schools

The documentation and cost required for any school-aged children to attend school will vary according to geographic location. For instance, for a school aged child of a sabbaticant visiting Ontario, the sabbaticant must possess a work permit for the dependent children to attend a public

school without paying International fees. It is extremely important to understand the requirements of the specific country and town which you plan to register your child/ren for school.

If your child/ren require special accommodations, contact your school for official documentation outlining these needs. Contact the school board of the district where you will be visiting to ensure you have all appropriate documentation to register your child/ren.

Prior to your departure, it is advisable you obtain a signed copy of your children's immunization records from your physician.

Take the relevant contact information of your home school to ensure that you are able to confirm any required information with the new school.

2. **Vehicles**

If you are taking your vehicle to the United States, it is important to verify how long Ontario registration is legal in the state/country in which you will reside. Also ensure your automobile insurance is adequate in the state/country where you will be driving your car.

3. **Driver Licensing**

It is legal in Ontario to drive with a license from another country for only three months and out of country vehicles must be registered with the province.

Check with U.S. customs for requirements when taking your car to the U.S. or driving with a Canadian license for an extended period…….

Immigration if Traveling Abroad

1. **Passports**

Ensure that all family passports are up-to-date and verify beforehand the entry requirements of the specific country that you will be visiting during your sabbatical. Some countries will not allow you to enter if your passport's validity is less than 6 months.

2. **Entry Documents and Requirements**

If you are traveling to countries where you are not a citizen, it is advisable to contact the consulate of your citizenship/permanent residence status to see if travel visas are required to enter the country.

Obtain a letter from your employer confirming you are employed at Western University and that you will be returning to your full academic responsibilities at the end of your Sabbatical.

3. **Health Insurance**

Please refer to the following:

UWOFA out of country travel Insurance

Eligible UWOFA members can receive additional emergency travel coverage beyond the $200,000 limit currently provided by Manulife.

If an incident or accident occurs while you are out of province/out of country, please call Manulife first. Contact information can be found on the back of your Manulife benefits card.

It is important you read and understand your plan before you travel. You should carry your Manulife benefit card and the Viator card with your when your travel. Both cards contain the plan and certification numbers and toll free emergency travel assistance telephone numbers.

More information may be found on the UWOFA website.