

**Arts & Sciences**  
**TTE Fellowship Support Guidelines**  
**Revised May 2024**

**Preface**

Tenured and tenure-eligible faculty have the distinct responsibility of contributing to current knowledge within their fields. Recognition of scholarly contributions through external awards and fellowships elevates W&M faculty visibility in, and expands their impact on, their intellectual communities. These guidelines are intended to value faculty recognition by their peers and granting entities while equitably and transparently evaluating requests for salary support.

**General Information**

- Fellowship Leaves (FL) must have pre-application approval from the Chair/Director and the Dean's Office, and any expectation of reduced activity in A&S must be clearly stated in the request for approval.
- All applications for fellowships or awards, whether they include reduced activity in A&S or not, must be submitted through the [W&M Office of Sponsored Programs](#) (OSP).
- Faculty should not expect that leave will be granted automatically as the result of a fellowship award.
- FLs may not be taken consecutively. However, a FL may be taken immediately before or after an SSRL (fellowships taken concurrently with SSRL are not considered FLs). To be eligible for another academic leave, faculty must be fully active in teaching, service, and research for a period at least as long as the previous leave.
- Fellowship funds must be run through the Office of Sponsored Programs (OSP) in order to facilitate uninterrupted funding and benefits. If the granting agency requires direct payment, benefits may be interrupted. The faculty member should confer with OSP and Human Resources. Arrangements must be made well in advance.
- The department/program will be expected to cover curricular needs for the fellowship period with no guarantee of replacement instruction, though replacements may be requested using the usual process for visiting faculty and adjuncts.

**Fellowship Leave Support for Pre-Tenure Faculty**

- If a pre-tenure faculty colleague obtains a fellowship that covers at least 50% of their 9-month base salary for the fellowship period, the Dean's office provides top-up salary funding as follows. If the FL is taken over one semester, the Dean's office will top up to 100% (total) of the 9-month base salary. If the FL is taken over a full academic year, the Dean's office will top up to 80% (total) of the 9-month base salary.
- In rare cases, the Dean's office may provide similar salary top-ups for fellowships that cover less than 50% of the 9-month salary, though in such cases, faculty are encouraged to take only a single semester of leave or not to take a leave during the academic year, and instead have the funds paid as summer salary if the award permits.
- In other cases, Leave Without Pay (LWOP) may be approved for faculty who are awarded fellowships that fund less than 50% of the 9-month salary for the fellowship period. (Note: see below for information on benefits for faculty on LWOP).

**Fellowships Combined with SSRL (Tenured Faculty)**

- Fellowship funds may be used to supplement the W&M provided salary for full year SSRLs, currently 80%, per grant terms and grant budget.

- If the total salary from a fellowship taken in conjunction with an SSRL over an academic year exceeds the faculty member's 9-month salary from W&M, the remainder may be used to support up to 3 months of summer salary, or to cover research or living expenses, depending on the terms of the award.

### **Fellowship Leaves Not Combined with SSRL (Tenured Faculty)**

- To be eligible for additional salary support from A&S, total fellowship funding must be at least 50% of the 9-month base salary that corresponds to the anticipated leave period (a single semester or an academic year). Except in rare cases, if the award is less than 50%, A&S will not provide additional salary and will not cover benefits. In such cases, the funds may be paid as summer salary if the award permits.
- In rare cases, Leave Without Pay (LWOP) may be approved for faculty who are awarded fellowships that fund less than 50% of the 9-month salary for the fellowship period. (Note: see below for information on benefits for faculty on LWOP).
- If total fellowship funding is 50% or more of the 9-month salary for the anticipated leave period (a single semester or academic year), the Dean's office provides top-up salary funding as follows. If the FL is taken over one semester, the Dean's office will top up to 100% (total) of the 9-month base salary. If the FL is taken over a full academic year, the Dean's office will top up to 80% (total) of the 9-month base salary.
- If the total salary from a fellowship taken over an academic year exceeds the faculty member's 9-month salary from W&M, the remainder may be used to support up to 3 months of summer salary, or to cover research or living expenses, depending on the terms of the award.

### **Benefits**

- If faculty choose to take LWOP from W&M to accept a fellowship, benefits will be affected and faculty are advised to meet with Human Resources to discuss the impact on their salary and benefits before accepting the fellowship.
- If benefits are an allowable cost on the fellowship, fellowship funds in excess of 100% salary for the period will be directed to pay benefits, and A&S will fund the balance of benefits, if any.
- If benefits are not an allowable cost on the fellowship, A&S will fund benefits for the leave period covered by fellowship funds.

### **N.B. Regarding Residency During Fellowships—Guidance from W&M Financial Operations**

According to the tax code, faculty sabbaticals can be treated as temporary assignments, as long as they fall within the IRS-defined duration of less than 365 days. To exclude the transaction from income tax withholding **changes**, it is essential to ensure that the primary purpose of the sabbatical has a clear business-related objective. If the primary purpose is met, then, there **should be no change** in income tax withholdings for the duration of the sabbatical, as long as it remains within the 365-day threshold. [No out-of-state employee documentation required.]

However, if the sabbatical extends beyond 365 days, Financial Operations will need to carefully assess the applicability of a state withholding change. It is crucial to monitor the duration of the sabbatical closely to ensure compliance with tax regulations and to make any necessary adjustments as needed.