



## **Do It Yourself Sabbatical Guide**

### **Overview**

Sabbaticals for nonprofit leaders are a shrewd leadership investment. A McKinsey & Co. publication addressing the chronic underinvestment in nonprofit leadership development endorsed sabbaticals as an effective tool. The study also noted that sabbaticals were tied for the top leadership investment desired by nonprofit leaders. L. Callanan, et al. *What Social Sector Leaders Need to Succeed* (2014).

As much as we wish that every organizational leader had access to a funded sabbatical program, we recognize that this is not the case. The Durfee Foundation is not able to meet the demand for sabbaticals in Los Angeles, let alone meet the needs of the sector nationwide. This is why we are creating this *DIY Sabbatical Guide* to share the knowledge that we have gained from over 20 years of working with leaders before, during and after their sabbaticals. It is our hope that some organizations will be able to implement their own sabbatical policies.

For funders interested in creating a Sabbatical Program, please see the *Sabbatical How-To Guide for Funders* <https://durfee.org/durfee-content/uploads/2016/06/Sabb-How-to-Guide-2016.pdf>

This guide addresses the special circumstances of Executive Directors/CEOs taking sabbaticals of approximately three months. It assumes that they have already cleared this decision with their board.

### **Background**

Since 1997, the Durfee Foundation has operated its Sabbatical Program for nonprofit leaders. The program makes grants to six Los Angeles County nonprofit organizations to allow their principal leaders to take an extended leave from the organization, most commonly for three months, in order to rest and rejuvenate. Recipients typically travel, spend time with friends and family, develop or renew hobbies and interests, read, exercise and simply enjoy unscheduled time. They are prohibited from engaging in work-related or professional development activities, or

even activities that have specific goals, so as to take advantage of this unique opportunity to disconnect from their fast-paced, goal-oriented lives.

The benefits of sabbatical programs to the individuals receiving the sabbatical and their organizations are profound and far-reaching. A study of five sabbatical programs over five years shows that sabbaticals not only provide needed respite to nonprofit leaders, they increase organizational capacity, aid succession planning and strengthen governance, D. Linnell and T. Wolfred, *Creative Disruption: Sabbaticals for Capacity Building and Leadership Development in the Nonprofit Sector* (2010) (<https://durfee.org/durfee-content/uploads/2016/06/Creative-Disruption-Sabbatical-Monograph.pdf>).

There are several sabbatical programs operating in the U.S. These are the ones that we know about:

- [Barr Foundation](#) (for Boston nonprofit and public school leaders)
- [The California Wellness Foundation](#) (for California nonprofit health leaders)
- [The Clare Rose Foundation](#) (for Orange County and San Diego nonprofit leaders)
- [O2 Initiatives](#) (for San Francisco and Alameda County nonprofit leaders)
- [Virginia G. Piper Trust](#) (for Phoenix nonprofit leaders)
- [Rasmuson Foundation](#) (for Alaska nonprofit leaders)
- [Z. Smith Reynolds Foundation](#) (for North Carolina nonprofit leaders)

## **PREPARING FOR A SUCCESSFUL EXECUTIVE DIRECTOR or CEO SABBATICAL**

So, your board has agreed to award you a Sabbatical. Congratulations!

One of the first issues that you must address is deciding who will take over your duties during the sabbatical. The Durfee program requires that the interim leadership during the sabbatical come from within the organization; we do not permit an outside interim E.D. or board member to take over. The reason for this is that we find that the sabbatical provides an excellent opportunity for staff to try out new responsibilities for a short time and increase their own development. In most instances, interim leadership is assumed by a management team of two to three deputy leaders.

There is no doubt that the E.D. sabbatical can be stressful for an overworked staff that must take on new responsibilities. Durfee provides a \$3,000 bonus for the board to share among the team of interim staff. Durfee highly encourages organizations planning an E.D. sabbatical to consider giving some kind of bonus to interim staff.

The point of the sabbatical is not for the organization to remain in a holding pattern for three months and then return to business as usual, but to provide a learning

opportunity for staff and board. When you return, your organization may restructure because the sabbatical showed how duties could be distributed differently and allowed secondary staff to develop new skills. Indeed, Durfee's goal for the Sabbatical is to spark some redelegation of work that results in increased leadership capacity by deputy staff, and more time for the leader to engage in "big picture" endeavors.

### **6-12 Months Prior to Departing:**

Decide on the best time to take a sabbatical, and put it on your organization's calendar. Schedule it so that you can make a continuous break, i.e., don't plan on being away for one month, returning for the big fundraiser, and then leaving again.

Don't shortchange yourself on time. Three months is ideal. We've learned that two months is too short, and anything more than four months can be too taxing for staff. So shoot for three, if you can. You don't know when you are going to get another opportunity like this.

As noted above, decide on your interim leadership structure. Depending on how your management is configured, it might be a team that divides up the E.D.'s work, or it might be one person as acting E.D.

Create a written plan for how decisions will be made and work will be handled. Be very clear about decision-making: is it majority rule or consensus? If someone is absent, is the rest of the team authorized to make decisions? Think through both everyday and worst-case scenarios.

Develop an interim leader (or interim leadership team) job description. The job description should indicate that the interim team will manage the organization based on existing policies and does not have the authority to make major policy or strategy changes.

Have regular meetings with the interim leadership team in the months prior to your departure to ensure open communication.

Set aside time every week or two to plan what you are going to do on your sabbatical. If you are planning a trip, research travel destinations. Look into house exchanges. Talk to your family and friends that you are going to visit. Planning your sabbatical can be a respite in itself.

Plan a trip for the beginning of the sabbatical. The best thing you can do is get out of town right away.

When planning, keep in mind that you should not over-plan your sabbatical. Allow unscheduled time to relax. Don't transfer your Type A work performance compulsions to pleasurable activities.

### **3-6 Months Prior to Departing:**

Invite interim leader(s) to shadow you in the weeks leading up to your departure. If you aren't doing it already, have staff members attend board meetings so that staff and board can get to know one another, or get to know one another better.

Have senior staff represent the organization at the outside meetings you would normally attend.

Give detailed written instructions to your interim leadership about whom to contact about what, where things are located, etc. These instructions will be useful long after your sabbatical.

### **0-3 Months Prior to Departing:**

Set up a strategy for when it would be appropriate for the office to contact you in case of emergency. For example, the board chair and acting E.D. must decide in person, face to face, that a call cannot be avoided. Impress upon board and staff that this is reserved for true emergencies and not just troubling news or sticky situations. Part of this experience is for the board and staff to learn how to make decisions and act without checking in with you. Ideally you will never be contacted.

Don't try to do your work in advance, such as preparing all of your grants ahead of deadline.

In the last month before you leave, have the interim leadership team make the executive decisions they will have to make in your absence.

Express gratitude to your staff and board.

If possible, give a bonus to the staff members who are stepping up.

Ask the board chair to pay special attention to the interim leadership team when you are gone, or to designate a board member to be the staff liaison.

If board members are in the habit of being in regular communication with you, let them know that they should not have the same expectations from interim leadership staff.

Remember that nothing changes much in three months.

Don't start anything new in the last month before you leave.

Designate someone to sort through your work emails, voicemails and correspondence and reroute them. The goal should be that you do not return to a huge pile of unfinished business, but that business as usual continued without you.

Set up a private email account to use during your sabbatical.

Contact key people like program partners and major funders to let them know you are going on sabbatical and whom they should contact in your absence.

Create outgoing messages for your email and voicemail that clearly state you are away on sabbatical and cannot be reached until X date. Provide information about the contact person who will manage in your absence.

If you use a mobile phone for work, leave it behind and purchase a prepaid mobile phone for use during your sabbatical.

Have a plan for how you will deal with social media. Facebook and Instagram might be a great way to stay in touch with friends, but it can be difficult if not impossible to shut out the work world.

Have someone to call for support as you prepare, maybe another E.D. who went on sabbatical.

### **During Your Sabbatical:**

You will be exhausted at the beginning, so don't try to do too much right away. Many people find that it takes at least two weeks to unwind.

Plan to leave town, even for a short-distance trip, within the first two weeks of your departure. It's hard to resist the urge to check in when you're in close physical proximity to work, especially at the beginning.

Do whatever recharges your batteries. Maybe it's sitting and reading a novel all day, or learning to parasail, or spending time with an elderly relative. Enjoy unscheduled time. Consider spending some time by yourself.

Resist the temptation to check your work email "just for a minute," or search for news about your agency. You know that it's a black hole that will suck you in. Some organizations changed the E.D.'s password so that there was no way to check in.

Don't be surprised if you experience disorientation at the beginning of the sabbatical as you learn to disconnect from your work identity.

Get over the guilt of seeing the mail carrier, the teacher, the checker at the market who may ask why you aren't at work.

Even if you normally socialize with work friends or board members, take a break from those connections during your sabbatical.

## **Your Return to Work**

Don't overbook your return – have a “stealth week” when you are back in the office but not yet making appointments and attending meetings so you can catch up without too much stress. Consider working reduced hours the first week, or come back to work on a Wednesday so that you start with a half-week.

Ease back into your routine. Plan your first contacts and don't immediately start reacting to everything. Observe some of the changes that took place when you were gone. You may consider making some permanent.

Meet with your interim team to learn what happened when you were gone. Don't be critical if they handled situations differently than you would have.

When you return, everyone will seem like they are moving too fast, talking too fast, making decisions too fast. You used to be like this, too. It will take time to readjust.

Don't be surprised if you experience the post-sabbatical blues. You may feel sad that your sabbatical is over, or depressed to be back in the office. This is normal, and may last for a few weeks. It's helpful to talk with someone else who has taken a sabbatical.

Use your return as an opportunity to see work in a fresh way.

Express your gratitude to your staff and board again.

## **Life After Sabbatical**

Look around your workplace and see what changed for the better while you were gone, or makes you reconsider where resources and time are currently spent. Consider implementing organizational changes that take this into account.

Plan a nice vacation every year – something to anticipate.

It's okay to set boundaries around work. It's important for you to model this for your staff.

Stay in touch with the side of you that has nothing to do with your work – read, dance, travel, hike, see plays, listen to music, volunteer at an organization in another field.

Consider implementing a sabbatical policy for your staff. The Durfee website has [sample sabbatical policies](#) from a variety of nonprofit organizations.