



The Durfee Foundation

How-To Guide for Nonprofit Organizations

Sabbatical policies are not just for CEOs and Executive Directors, nor are they only for organizations that receive Durfee funding. Many organizations have decided to promote sabbaticals for all or most of their staff as an organizational development tool and an attractive benefit to retain strong staff. A well-drafted sabbatical policy is a must.

There is no one template for an organizational sabbatical policy; each organization's size, structure and history is different. Some factors to take into of consideration are:

- Organizational size, number of staff
- Current staff tenure
- Budget size and financial health
- Type of work (i.e., are there front-line staff who are exposed to secondhand trauma or other serious stress?)
- Eligibility criteria (How many years before staff are eligible? Is a shorter sabbatical available for staff with shorter tenure?)
- Process for selection and pacing (how do you proceed when several staff are eligible at the same time?)
- Purpose of the sabbatical (Durfee strongly promotes sabbaticals for replenishment, rather than for professional development)

Durfee applauds organizations that adopt sabbatical policies that benefit all staff. Following are several examples of staff-wide sabbatical policies. ***If you have adopted a sabbatical policy and are willing to share it, please send it to us and we will add to our repository for others to use as a resource***



Sabbatical Leave Program

Effective institutions are guided and sustained by creative, committed and dependable people. Peace Over Violence's Sabbatical Leave Program instituted by the Board of Directors recognized that leaders need time to think, rest, reflect and rejuvenate if they are to keep their organizations and programs ahead of the curve.

Peace Over Violence recognizes that there are leaders within the various facets of our very own organization: project directors, coordinators, administrative personnel, managers, case managers, emergency response team personnel, etc., who exhibit year after year the commitment, creativity, tenacity, management and leadership qualities that help make POV the dynamic and model agency that it is.

They exhibit these qualities on an on-going basis and sometimes under demanding conditions and often with relentless deadlines. These efforts contribute to POV's best practices for the betterment of our community. The enormous demands of working in social change, social justice and social service organizations such as our own often interfere with taking sufficient time off to refresh and rejuvenate.

In an effort to create opportunities to replenish the stores of energy and inspiration for our agency's committed staff, POV offers the Sabbatical Leave Program as a benefit. The program will offer paid leave for a minimum of 6 weeks to a maximum of 10 weeks if a staff member so chooses to combine the leave with their regular vacation time. The sabbatical leave comes with a cash stipend for expenses up to \$3,000.

This sabbatical time will be designed by the employee and could be used for travel, study, writing, staff development, artistic endeavors, reflection, family time or any other pursuits that will enable and encourage renewal. They may not work for POV or take any other employment during this time.

The employee must be in good standing, an employee for a minimum of 8 years, have not requested and received a leave of any kind of more than 1 week duration (regular sick leave and vacation time exempted) such as parenting leave, maternity leave, worker's comp leave, special leave without pay etc. during the fiscal year they are applying. The eligible employee must submit an application requesting to be considered for the sabbatical leave program describing how they will utilize their sabbatical time.

Eligibility

Candidates for this program should:

- Have worked for POV for a minimum of 8 years full time or 10 years part-time
- Have received positive and above average performance evaluations and deemed to be in good standing

- Not have received this award in the past 5 years or have received any other fellowship, mentorship or special award that carries opportunities away from the POV through another organization or foundation within 2 years or any extended leave or extended absence from work within the past one year.
- Be an outstanding staff member who has demonstrated a track record of consistent contribution to the organization and hence to the work POV does in the community at-large.
- Accept the sabbatical as an opportunity to refresh and rejuvenate and as an opportunity to come back refreshed with renewed commitment.
- Be recognized by their peers and supervisors as a deserving individual.

The Candidate's supervisor should:

- Offer an endorsement of the request for leave, establish that the employee is in good standing with above average performance evaluations and authorize the sabbatical leave dates
- Approve a work plan operational during the candidates absence, and upon the candidate's return
- Make sure that regular health and other benefits are maintained for the candidate during the period of leave.

Requirements

The primary requirement for the sabbatical leave is that the time is spent away from work. This may take the form of pleasure travel, pursuit of a vocational interest spent away or at home with one's family. The leave can combine more than one element or more than one location, but candidates should take care not to over schedule their sabbatical time. POV recognizes that some candidates may have a desire or need for professional development. Consequently, participation in tuition-based training programs, residencies or study time may constitute a component of an applicant's proposal.

The other requirements for the sabbatical leave are that it involves a minimum of 6 weeks paid leave taken as a totality to a maximum of 10 weeks and that awardees submit a brief written report about the sabbatical to the Executive Director who will transmit that report to the Board of Directors within two months of completion.

One sabbatical leave will be granted to a deserving candidate annually (Fiscal Year). The POV Board of Directors reserves the right to change or suspend the sabbatical leave program.

Selection Committee

The selection committee will be made up of two board members appointed by the Chair of the Board of Directors and the Executive Director. If the Executive Director is the applicant the E.D. will not serve on the committee and the board will appoint a third person from the board.

Deadline:

Applications submitted by MAY 31st. to the Executive Director with all accompanying paperwork.

Presented to Board of Directors for selection at the June board meeting.

Selection process & decision by June 30th.

Sabbatical leave taken within a 12 month fiscal year.



Sabbatical Leave Application

Please provide this application along with the requested material:

- Supervisor endorsement
- A work plan that will be developed once selection is made.
- Please attach a letter of no more than 5 pages that address the following questions:
Please take the opportunity to reflect on why you do what you do here at POV.
 1. Why are you engaged in your current field of work? Please describe your work.
 2. What significant lessons have you learned along the way? How has the work impacted you?
 3. What contributions or impact to you feel you have made on the organization and in the community?
 4. Why do you think that this year is the best time for you to receive this sabbatical award benefit?
 5. What is your plan for the sabbatical? Please describe how you will use the time to renew and rejuvenate. How will it benefit you personally and professionally?

Submit the packet to the Executive Director by the deadline date. Incomplete applications, late submissions, or faxed submissions will not be accepted or considered.

NAME: _____

TITLE: _____

DEPT.: _____

PROGRAM _____

WORK PHONE: _____ EXT. _____

HOME ADDRESS:

DATE OF HIRE: _____

Individual sabbatical funds requested: \$3,000

Leave time requested:

Number of Sabbatical Weeks: Six

Vacation time (weeks) added if any: _____

Total Leave & Vacation time requested: _____

Proposed Dates: _____

ARMORY

Sabbatical Leave

The Armory believes that it is advantageous to permit long-term exempt employees to disengage themselves from their duties for an extended length of time and, thus, to provide them with an opportunity to pursue their outside interests, develop new perspectives, or to rest, according to individual preferences. Accordingly, the Armory has adopted the following sabbatical policy:

1. Exempt employees may request a sabbatical of up to four months duration for each period of seven years of exempt employment completed.
2. Employees who take sabbaticals will receive one-half of their regular compensation during the term of the sabbatical.
3. Employees on sabbaticals may retain all sums earned during that period, such as teaching fees, book royalties, etc. However, they are not permitted to engage in employment which is similar to their duties at the Armory.
4. Vacations may not be taken within two months before or after taking a sabbatical.
5. By December 31 of each year, all applications for sabbaticals which would begin in the following fiscal year must be submitted to the Executive Director. Employees must first consult with the director of their department about the timing of a requested sabbatical before submitting an application.
6. In extraordinary circumstances, the Executive Director may consider the granting of a sabbatical outside of the time frame given in item #5. However, at all times, the Executive Director retains the sole authority for deciding whether a sabbatical will be granted, and, if so, when. These decisions will be based upon the needs of the Armory.



CENTER FOR THE
PACIFIC ASIAN FAMILY

Personal Leave Program (Rev. 5/2009)

Program Description:

In an effort to integrate sustainability and resilience into the internal infrastructure of our organization, we seek to create opportunities for longtime employees to renew themselves; thus CPAF offers a Personal Leave Program as an employee benefit. This program is an opportunity for employees to take paid leave for 4 weeks to which she/he may choose to add her/his regular vacation time for up to 2 weeks, for a combined maximum of 6 weeks.

The personal leave time will be designed by the employee and could be used for travel, study, writing, staff development, artistic endeavors, reflection, family time or any other pursuits that will enable and encourage resiliency and renewal. The employee may not work at CPAF or take any new or additional employment during this leave time. This program is also described in our Employee Manual (2009).

Employee Eligibility:

- Have worked at CPAF for a minimum of 5 years;
- Be in good standing;
- Have not received this or any other fellowship or similar awards through another organization or foundation within the past 5 years;
- Accept the leave as an opportunity to refresh and rejuvenate and as an opportunity to come back to work energized and with a renewed commitment.

Application and Selection Process:

The eligible employee must submit the attached application to the Executive Director requesting to be considered for the Personal Leave Program. Applicants should describe how they will utilize her/his time. In addition, a supervisor must offer an endorsement of the request for leave, establish that the employee is in good standing and authorize the leave dates. The supervisor must also devise and approve an operational work plan during the candidate's absence and upon the candidate's return to work.

The Board Finance Committee will review and the Executive Committee must approve each leave request. The Executive Director will then notify applicants and their respective supervisors of the final decisions. *Please note that CPAF's Board of Directors reserves the right to change or suspend the personal leave program at any time.*

PLEASE COMPLETE THE ATTACHED REQUEST FORM, INCLUDING THE SUPERVISOR SECTION. ONCE FINISHED, SUBMIT THE APPLICATION TO THE EXECUTIVE DIRECTOR.



CENTER FOR THE
PACIFIC ASIAN FAMILY

Personal Leave Program REQUEST Form

Today's date: _____

Employee name: _____ Title: _____

Supervisor Name: _____

Program: ES TS CP Administration

Number of years employed at CPAF: _____

Proposed dates for personal leave: _____

Please provide a brief description of how you will be utilizing your time during your personal leave and how the leave will benefit you?

• Did your supervisor complete the section on the back of this form? Yes No

AFTER CAREFULLY READING THE TERMS AND CONDITIONS OF THIS PERSONAL LEAVE PROGRAM, AS OUTLINED IN THE EMPLOYEE MANUAL, I HEREBY SUBMIT AN APPLICATION FOR THE PERSONAL LEAVE PROGRAM. I AGREE THAT IF THE PERSONAL LEAVE IS GRANTED, I WILL COMPLETE ALL NECESSARY DOCUMENTS AND TASKS PRIOR TO THE START OF THE PERSONAL LEAVE. ADDITIONALLY, I WILL UTILIZE MY TIME DURING MY PERSONAL LEAVE AS DESCRIBED ABOVE AND WILL NOT ENGAGE IN ANY REMUNERATIVE OCCUPATION OTHER THAN THAT WHICH I COULD PERFORM WHILE IN ACTIVE SERVICE. I AGREE TO RETURN TO THE SERVICE OF THE CENTER FOR THE PACIFIC ASIAN FAMILY AT THE EXPIRATION OF THE LEAVE, UNLESS PREVENTED BY VERIFIED ILLNESS OR DISABILITY.

Employee signature: _____ Date: _____

Date request reviewed by Finance Committee: _____

Date request evaluated by Executive Committee: _____

Committee Decision: Approved Not approved

Executive Committee Member signature: _____ Date: _____



3.9 Sabbatical

After the seventh year of employment, employees will be provided with a three (3) month paid sabbatical in lieu of other paid vacation time. No sick, personal or vacation days are earned during a sabbatical.

The employee will earn vacation time at the rate of 20 days/ 160 hours per year. The additional time off for the sabbatical will be added at the time of approval and scheduling the sabbatical.

Request for a sabbatical must be submitted in writing via email to the Executive Director and/ or your supervisor. As the organization will have to make considerable accommodation to ensure that the work is continued, SAJE requires the request for a sabbatical to be submitted 5 months prior to the first day of your desired time off.



4.13 Sabbatical Policy

Research on leadership development indicates that people benefit from sabbaticals as a way to take a break, refresh and recharge. Sabbaticals offer an opportunity for professional development for the employee. Because sabbaticals often create stretch opportunities for peers, this program is a part of GEO's strategy for our own organizational development. While some organizations make this available only to CEOs, we think a sabbatical for all staff after a period of service to the organization is a meaningful way to reward their contributions and energize staff for the next phase of their tenure at GEO.

- **When:** Upon completion of every five years of continuous service.
- **Length:** 6 weeks (after 5 years of service) and 10 weeks (for subsequent sabbaticals, e.g. after 10 and 15 years of service). An employee may combine sabbatical leave with vacation leave. Sabbatical time cannot be split (i.e. the sabbatical must be continuous). We encourage use within one year. Sabbatical will be forfeited if not used within 24 months. After their first sabbatical, employees must wait at least five years from the start of their previous sabbatical to begin their next one.
- **Eligibility:** The senior team will discuss all sabbatical requests and the CEO is the final decision-maker. Employee must have received an overall rating of "Consistently Exceeds Job Requirements and Work Competencies" or "Meets Job Requirements and Work Competencies and Often Exceeds Them" in their most recent performance review. Only one GEO staff member can be on sabbatical at any given time. Sabbaticals must be arranged at least three months in advance and must be approved by the employee's direct supervisor. Supervisors will need to take into account the needs of the team and the organization when approving sabbaticals.

- **Focus:** The primary focus for the sabbatical is restorative.
- **Compensation:** Full salary during sabbatical. There is no cash value associated with the sabbatical. If you do not use your sabbatical during the time you are employed at GEO, you will forfeit it. During your sabbatical, GEO will not cover the costs of travel, professional development fees or other direct costs above your professional development allocation for the year. Staff on sabbatical may not earn additional outside income.
- **Follow-up:** Upon their return, employee should write a reflection and submit it to the senior team. Employees will also share reflections on their sabbatical at a brownbag within 2-3 months of their return.

GEO Sabbatical Program for the CEO

- **When:** After completion of seven years of continuous service, the board may choose to offer the CEO a sabbatical.
- **Length:** 8-12 weeks. Sabbatical leave can be combined with vacation leave.
- **Eligibility:** The CEO will need to have received high ratings on his/her most recent performance review. The timing, length and eligibility for a sabbatical will be at the discretion of the board of directors taking into account GEO's financial health and other organizational considerations including the sabbatical plans of other key staff. Sabbatical will need to be arranged at least three months in advance.
- **Focus:** The primary focus for the CEO sabbatical is restorative.
- **Compensation:** Full salary during sabbatical. There is no cash value associated with the sabbatical. If the CEO does not use a sabbatical, it will be forfeited. While on sabbatical the CEO may not earn additional outside income.
- **Follow-up:** Upon his or her return, the CEO will discuss his/her experience with the senior team and the full board.
- **Other:** In the months prior to the sabbatical, the CEO will coordinate how responsibilities will be divided with other members of the senior team. It may be appropriate to name an acting CEO with appropriate compensation. At least six weeks prior to the sabbatical, the CEO will propose a plan to the executive committee for discussion and ultimate approval.