



Do-It-Yourself Sabbatical Guide for Nonprofits, with Sample Policies

The benefits of sabbaticals for nonprofit leadership are well documented. 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 \(2010\)*](#). A 20-year retrospective study of the Durfee Foundation's sabbatical program confirms these results and further documents how sabbaticals can be a lever for systems change at organizations. D. Linnell, [*From Creative Disruption to Systems Change \(2017\)*](#).

In addition to the Durfee Foundation's program in Los Angeles, 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 Bay Area 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)

[Meyer Foundation](#) (for Washington, D.C. nonprofit leaders)

As much as we wish that every organizational leader had access to a funded sabbatical program, we recognize that this is not the case. This is why we created 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.

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. If you need help getting board approval, use the studies cited above to make the case that Executive Director sabbaticals benefit the entire organization.

Many organizations have implemented sabbatical policies to benefit all staff who have been with the organization for a certain number of years. Sample policies are included at the end of this guide.

PREPARING FOR A SUCCESSFUL EXECUTIVE DIRECTOR or CEO SABBATICAL

So, your board has agreed to award you a sabbatical. Congratulations! Following is a rough timeline to help you prepare.

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. Shoot for three, if you can. You don't know when you are going to get another opportunity like this.

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.

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

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.

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

If you do not already have a personal email account, create one. If you have a personal email account, move your personal correspondence to that account.

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.

If you are traveling internationally, make sure your passport is up to date and that you obtain necessary visas. Book all travel with your personal, not your work, contact information.

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, passwords, 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.

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. If you want to stay on social media, see about adjusting your settings to limit contact with your work world.

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

During Your Sabbatical:

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

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.

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.

Meet with your interim team to learn what happened when you were gone, and what worked and didn't work with the new management structure. Don't be critical if they handled situations differently than you would have.

Take the time to reflect with your staff about what they learned about themselves and the team. This is an opportunity for a reboot, a time to see the organization in a fresh way. Consider whether some changes should be implemented permanently.

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.

Express your gratitude to your staff and board again.

Life After Sabbatical

Plan a 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. Following, Durfee provides sample sabbatical policies from other nonprofit organizations.

Sample Sabbatical Policies

The Durfee Foundation applauds organizations that implement sabbatical policies for their long-serving staff. Organizations with such policies find them to be an attractive benefit and retention tool. There are many ways to structure a sabbatical policy, depending on the size, history and mission of an organization. Here are a few examples.



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.