

CREATIVE DISRUPTION



Sabbaticals for Capacity Building & Leadership Development in the Nonprofit Sector

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Study Commissioned by:

Alston/Bannerman Fellowship Program
Barr Foundation
Durfee Foundation
Virginia G. Piper Charitable Trust
Rasmuson Foundation

With Additional Support from:

The Evelyn & Walter Haas, Jr. Fund

Acknowledgements:

Natasha D'Silva for survey and report production support
Stacey Lee for synthesis of funder interviews
Liz Russell for editing and administrative coordination
Josh Solomon for the literature search and synthesis
Jonathan Spack for editing support

About the Survey:

For several years now, a handful of foundations have provided sabbaticals to selected nonprofit leaders. Four of these funders—the Barr Foundation (Boston), The Durfee Foundation (Los Angeles), the Virginia G. Piper Charitable Trust (Phoenix), and the Rasmuson Foundation (Alaska), along with the Alston/Bannerman Fellowship Program (national)—joined together to conduct a collective study of the results of their sabbatical programs. Although all were experiencing good results either anecdotally or through local evaluation findings, they had questions about how they might improve their programs and hoped the answers could be informed by a comparative study. The study's title, *Creative Disruption*, is an acknowledgement that although a sabbatical of some months' duration may be disruptive to the work and life routines of a leader and to management patterns in his or her organization, the evidence demonstrates that this disturbance leads to new perspectives on the part of the leader, the board, and the staff with regard to organizational vision, shared leadership, and skill development.

The study's findings are based on surveys of 61 sabbatical awardees and 30 interim leaders, interviews with program staff and awardees, and interviews with consultants and evaluators who support these programs. We also reviewed previous evaluations and background materials for each of the five participating programs.

You can download copies of this report at www.compasspoint.org/creativedisruption and at www.tsne.org/creativedisruption. The full 75-page report on which this shorter version is based is available on those sites as well.

THE POWER OF SABBATICALS

The stresses and demands of leadership make intellectual, emotional, creative, and even physical burnout all too common among nonprofit executives. One of the most effective and cost efficient ways to prevent this from happening is the sabbatical. A “time away” from the daily grind of high-pressure work routines can rejuvenate body, mind, and spirit. It can also bring an executive to new perceptions and re-framings that ultimately create greater leadership capacity in his or her organization.

Yet, the idea of granting an executive a sabbatical rarely comes up for consideration. Common assumptions that a leader who enjoys a taste of freedom from the job will never return, or that an extended, if temporary, vacancy in the executive director’s (ED) chair will create chaotic disruption in an organization keep proposals for sabbaticals well off the table. The typical refrain from a nonprofit leader: “I could never go to my board with this..”

EXPOSING THE MYTHS

We now have evidence that these concerns are unfounded. In fact, EDs who go on sabbatical are more likely either to remain in their positions or *extend* their tenure, not cut it short. And rather than causing chaos, disruptions in an organization's day-to-day affairs may be *beneficial*. Perhaps most importantly, a sabbatical can be a relatively inexpensive but highly productive capacity-building tool that yields measurable results. To explore these results, five philanthropic organizations that provide sabbaticals to nonprofit leaders commissioned this study. What it reveals is both surprising and hopeful.

KEY FINDINGS

The data demonstrate a number of positive outcomes that are unexpected, broad, and even profound. Here are some of the study's other important findings about sabbaticals:

They increase organizational capacity.

quickly learn new skills and take on new responsibilities. As a result, the capacity of the second tier of leadership is enhanced, and upon the ED's return, he or she often delegates more responsibilities and decision-making to these individuals. A nonprofit is also then more likely to begin focusing on cultivating and protecting its human resources—the most important resources it has.

In preparing for the ED's absence, staff members

They are important tools for succession planning.

a dry run for a future leadership transition. The experience can clarify what the ED's responsibilities actually are—important information when looking for a successor. And interims can decide if the ED's job is really what they want.

A sabbatical can act as

They strengthen governance.

effective as a result of the planning and learning that surrounded their sabbatical process.

Sixty percent of survey respondents said their board of directors is more

Funders benefit.

For a modest investment, foundations receive important returns from sabbatical programs such as building trusting relationships with leaders and gaining deeper perspective on community needs or receiving feedback regarding the foundation's impact on the community.

CREATIVE DISRUPTION: IN THREE PARTS

Many leaders in the nonprofit sector work under conditions of unrelenting stress, which potentially leads to burnout. The enormous demands of their jobs, often combining with financial pressure, can prevent them from taking time off for much-needed rejuvenation. When these leaders take a sabbatical, the extended leave from the day-to-day stress and concerns of nonprofit settings can produce benefits that fall not only to them but to their organizations and funders as well.

A handful of organizations have been providing sabbaticals to selected leaders among their grantees for some time. Four foundations—the Barr Foundation (Boston), The Durfee Foundation (Los Angeles), the Virginia G. Piper Charitable Trust (Phoenix), and the Rasmuson Foundation (Alaska), along with the Alston/Bannerman Fellowship Program (national)—joined together to conduct a collective study on the short- and long-term effects of their sabbatical programs. Although all of these foundations were experiencing good results, they had questions about how they might improve their programs and hoped a well-designed survey would inform their answers.

“The sabbatical was life-changing for me personally, and really good for my organization. I cannot say enough about the profundity of its impact.”

- AN AWARDEE

This document describes, in brief, what the research discovered. **Part One: Revitalizing Leaders**, presents some surprising findings. Not only do sabbaticals rejuvenate executive directors, but they also encourage them to reframe their perspectives on their own work and to share more leadership responsibilities. **Part Two: Building Capacity**, describes how a sabbatical can improve an organization's executive bench strength; model its transition planning; and in many cases, lead to a positive re-visioning of how an organization operates. **Part Three: A Win/Win for Philanthropy**, outlines how funders also benefit from supporting sabbatical programs, and why it's important for them to continue doing so. For readers interested in the full report, you can find it online at www.tsne.org/creativedisruption and at www.compasspoint.org/creativedisruption.

The Sabbatical Sample

The 61 sabbatical awardees who returned completed surveys — 48% of the 126 to whom it was sent — are substantially diverse with regard to gender, race, age, and length of nonprofit service. The group's gender representation is split down the middle. Fifty-six percent are people of color.

As might be expected, the awards, on average, went to nonprofit leaders with greater seniority, as well

as solid tenure in their jobs and in the nonprofit sector, with 74% older than 50.

Nearly 70% had occupied their executive role for 9 years or more at the time of the award. Average time working in the sector as paid staff was more than 22 years.

A survey was also sent to 61 nonprofit managers who served as interim or acting EDs while the sabbatical awardees were on leave. Thirty (49%) responded.



REVITALIZING LEADERS

The sabbatical recipients surveyed and interviewed for this study reported highly positive effects from their experiences. Many said it was a once-in-a-lifetime event or “one of the highlights” of their lives. Rejuvenation was the overall impact they reported most often.

Significant time away from daily routines was the major contributing factor to this renewal and its beneficial effects, both for the awardee and his or her organization. These effects can last a long time. The preponderance of survey takers reported that many of the positive changes they experienced remained with them one year or longer, post-sabbatical.

The majority of awardees set out from the very beginning to make their sabbaticals an extraordinary experience. Their personal drive to better themselves and increase their organizations’ community impact, paired with extended time away from job and home to give them space for reflection, produced the outcomes found in this study. The critical contribution of the awarding foundations was to use their standing in their communities to create a culture of “permission” for leaders and their boards to support sabbaticals. This one simple act of encouraging rest and reflection resulted in numerous valuable effects.

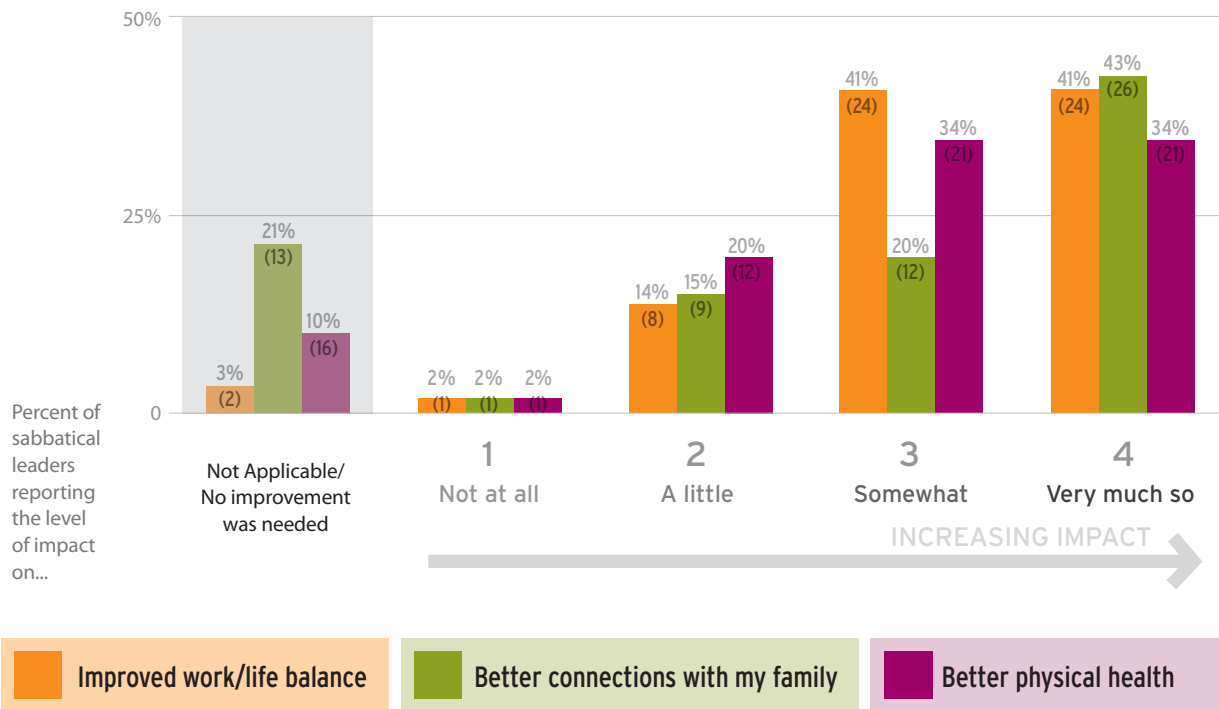
The foundations that sponsored this study also provide a “template” or set of guidelines for awardees on how to maximize the benefits of their sabbaticals, along with different forms of support for using the template such as a sabbatical orientation session for awardees, offers of coaching, and convenings for the backup leaders.

Which supports awardees took advantage of proved widely variable. The results of the study indicate no single form of support brought about a particular sabbatical benefit. Rather, encouragement from a respected funder, along with some upfront guidance on how to make the most of the sabbatical experience, seems sufficient to generate significant positive effects both for the awardee and, as we will see in Part Two, his or her organization.



WELL-BEING BY THE NUMBERS

As the chart below shows, the sabbatical significantly improved indicators of overall well-being such as work/life balance, better connections with family, and better physical health.



“Creative” Disruption? Really?

We chose the title “Creative Disruption” for this study to highlight the fact that although leadership sabbaticals of several months’ duration can be disruptive to organizations, they often spark creativity, establishing new perspectives on an executive’s work, organization, and leadership style. The disruption may also bring about the need for staff to take on additional responsibilities—sometimes permanently—and trustees or board members to examine their own roles from a new, productive perspective. As a result, new management structures frequently emerge, along with either a fresh vision for or an affirmation of programmatic

direction. Communication and decision-making systems often change, as well. Without the outside support and affirmation provided by a foundation, however, the majority of leaders will not, on their own, take extended time away—taking care of oneself rarely holds a high priority in the nonprofit sector. And most organizations cannot afford this gift of time on their own. This report, then, documents how a modest foundation investment in a sabbatical program can make a positive impact both on nonprofit leaders and the organizations in which they work.

INDIVIDUALS ACHIEVE

Many awardees achieved far more than a rejuvenated spirit. The majority reported they also realized:

Greater Confidence

Eighty-seven percent of the leaders who responded report increased confidence in doing their jobs after their sabbaticals. Greater confidence enabled leaders to free themselves for higher level work in policy and advocacy, raise funds more effectively, and think out of the box more freely.

Better Relationships with Staff, Board, Funders, and Community

Although improvements on the indicators of personal well-being were more frequently reported, sabbatical awardees also reported gains in their relationships with supervisees, funders, constituents, and the community.

New Vision

Three quarters of the leaders in the study found rejuvenation and reflection either helped them crystallize an existing vision for their organizations or frame a new one. Nearly half of those said they have had success in implementing their vision. These leaders include farm-worker organizers who have completely reorganized their approach; a museum executive who was planning on departing but whose new vision for a museum program that related to the large immigrant community in his city brought him new energy for the job; and a leader of a community-based program who brought back a vision of crossing boundaries and building collaboration with other community groups rather than competing with them for a larger piece of the pie.

STAYING IN THE JOB



One of the most common concerns about providing sabbaticals is that doing so will result in executive directors leaving their often burdensome positions. In fact, the data points in the opposite direction. Sabbaticals often reconnect these remarkable people with the reasons they chose their work and leadership positions to begin with. When asked to report on whether their sabbatical had influenced a “decision that I would stay in my job longer than I had previously projected,” a third said that this was true or very much true for them. Only 13% reported the opposite effect—that they planned to leave their job in the next one-to-three years.

The Big Ah Ha!

The absence of a leader for three months can be a challenging but productive moment for an organization. The Alston-Bannerman Program, which has provided sabbatical grants to longtime activists of color since 1988, reports that one of the themes it has seen consistently throughout 21 years of offering its program is that of “people coming back and realizing they are not that indispensable—that they don’t have to shoulder every responsibility.”

Donna Logan, the evaluator for the Rasmuson Foundation’s program, concurs: “A benefit for organizations is the realization that when sabbatical recipients leave, the organization does not fall apart.

They gain a keener appreciation of their staff’s abilities. This in turn builds confidence for the staff members.”

This big “ah ha” is most likely the insight that others achieve as well—the board, staff, constituents. No matter how dynamic, the leader is actually not indispensable. This one realization opens many interesting doors post-sabbatical for organizational development, including delegation and more shared decision-making, board members stepping up, a change of perspective for the leader on how much task level management he or she should be handling, and the concept that succession planning is healthy and does not imply the imminent departure of the leader.

Bill Watanabe and The Little Tokyo Service Center

A CASE IN POINT:

Bill Watanabe is the executive director of the Little Tokyo Service Center (LTSC) in Los Angeles. LTSC has an operating budget of \$8 million, with 100 full-time and 50 part-time employees. Programs under the Center's umbrella include childcare, afterschool and youth programs, family counseling, domestic violence counseling and shelter, affordable housing and community/economic development, services for the elderly, and other programs to serve low-income or non-English speaking people in need.

Watanabe first entertained the thought of taking a sabbatical after serving as a professional reference for a colleague who had applied for a sabbatical award from the Durfee Foundation. When a Durfee staff member encouraged him to apply, his first thought was, "I'm not burnt out. I really don't need one. I really love my work." Durfee staff asked Watanabe to consider that the sabbatical would give LTSC an opportunity to function without its founder of 20 years. When Watanabe mentioned the possibility to his board, they immediately encouraged his application.

Watanabe's three-month sabbatical in 1999 included a three-week guided tour of Israel and Egypt and a week in Tahiti, both with his wife; a two-week unstructured road trip with his brother-in-law; and a one month stint writing his autobiography, as a gift to his daughter. The trips and the writing time were "a once in a lifetime opportunity, things I would never have otherwise done" without the sabbatical award. "The experience gave me a great sense of self-worth, realizing that [through my community work] I had earned the award."

Today—10 years later—Watanabe sees helping leaders recharge as one important aspect of the experience, but not the only one. A sabbatical can also provide a springboard to strengthen an agency's second tier

of leadership. LTSC's deputy director served as interim ED in Watanabe's absence. He had judged her very competent in her deputy position and had full confidence she could lead the agency. During the sabbatical, two of her deputies took over her duties while she was in the top job. One of them is now a deputy to the ED.

As a result of insights gained while on sabbatical, Watanabe undertook a dramatic restructuring of LTSC. This included merging two 501(c)3s, one a community services center and the other a community development corporation, together as one entity. He also energetically ramped up a community organizing project that had been stalled. And the sabbatical helped him expand his vision of advocacy. In 1994, LTSC had begun a search for a site to build a large gymnasium in Little Tokyo, a high priority need for the community. By 1999, little progress had been made. With the "fresh set of eyes" he gained on his sabbatical, he reviewed several LTSC projects with the question, "Why are we doing it that way?" With particular regard to the gym project, he pondered, "Why should we not advocate more loudly for ourselves?" He realized he needed to create a bigger stir in the community. So he organized a vocal and visible demonstration in Little Tokyo that drew 500 people. "Politicians and funders saw it," and things began to happen.

Today, things are still happening. Both Watanabe and the organization continue to evolve. According to LTSC's board chair, the board realized that Watanabe was the right person to lead the Center, but that both he and the board came to realize the need for him to build a stronger second tier of leadership and move out of daily management. And that's exactly what has happened. "Now, if Bill were to leave tomorrow," the chair says, "the organization would be in very good hands."

BUILDING CAPACITY

Nearly one-quarter of the survey participants worked in human service (non-healthcare) organizations. Another 22% were community organizers. The percentage of the awardees' organizations in each of the budget size and staff size categories matches reasonably well with the percentages for the nonprofit sector as a whole. For instance, 59% of the organizations have 20 or fewer staff, and 78% have budgets of \$3,000,000 or less. We believe then that the benefits of sabbaticals can apply to nearly the entire spectrum of organizations that constitute the sector. Following are some achievements the organizations realized:

GOVERNANCE IMPROVES

The evidence demonstrates that sabbaticals can bolster governance. In the survey, 60% of awardees and 53% of interim leaders reported that the board of directors became more effective as a result of the planning and learning surrounding the sabbatical. Seventy-five percent of the interims said they had a more productive relationship with their board as a result of working more closely with its members.

From previous local studies of sabbatical programs as well as the survey's findings, it appears that governance could be another organizational arena that may shift during a sabbatical. Integrating board members more fully into the orientation, planning, and holding reentry meetings (as some programs already do) may make that shift more likely and more productive.

"This was probably one of the greatest outcomes. I am so much more involved with my peers at other agencies now!"

- AN AWARDEE

"My desire has always been that the organization be eventually run by the women we serve. Since my return, I've experienced the staff being more confident with their input/decisions/assessments!"

- AN AWARDEE

CONNECTION AND COLLABORATION

Convening alumni from the sabbatical cohorts has emerged as a critical post-sabbatical element. Nearly nine out of ten awardees reported having attended foundation-sponsored formal gatherings, and 80% reported that they have developed a personal and/or professional bond with other awardees.

"The organization has created a more shared approach to decision making and clearer lines of accountability."

- AN AWARDEE

The Alston-Bannerman Fellowship Program recently convened its awardees from all over the country for a celebration and to discuss and record lessons learned. Piper and Durfee have well-established alumni gatherings. Piper has been providing up to five awards per year since

2001 and has monthly or bimonthly meetings of their Fellows.

Peer learning circles have emerged organically from these frequent, informal gatherings. The circles serve to broaden leaders' knowledge of other nonprofit sectors and provide peer support. Barr holds formal retreats several times a year over three years for each sabbatical cohort and conducts an annual alumni gathering. While the Durfee alumni gatherings have changed over the years from less formal to more formal, the alumni group has always resisted a set agenda and wants time to focus on making connections. This desire for less structure and more time for connection runs across the programs.

Convening awardees in this way allows them to build connections that often mature into full collaborations. It is at this point where sabbaticals begin to influence cross-organizational or community impacts.

"I have informal lunches with other awardees (all of whom I did not know before) to bounce ideas off of them and to share information."

- AN AWARDEE

Measuring Impact: Shared Leadership and Building the Bench

Awardee responses demonstrate that as a result of the planning and learning surrounding a sabbatical, the organization changed so that post-sabbatical the director:

- + Shared a greater amount of decision-making with managers (85%)
- + Was more comfortable delegating major responsibilities (84%)
- + Felt that the managers in their organization had become more skilled in their positions (83%)
- + Restructured the management team (69%)
- + Restructured their job and delegated some of their duties to others (64%)
- + Reported that the board of directors became more effective (60%)

Sixty-one staff who served as interim leaders for the sabbatical awardees were sent surveys regarding their experiences. Thirty of them responded to the survey. Like the awardees, they report greater shared leadership and executive delegation post-sabbatical. More specifically, they:

- + Report that their job has been restructured and they continue to be responsible for some duties they performed as an interim leader (60%)
- + Agree that managers are better skilled in positions (77%)
- + Agree that there is more delegation (77%)
- + Respond that they have a greater sphere of decision-making authority (67%)
- + Report that the management team has been restructured (43%)

The figures speak to the organizational shifts caused by the creative disruption of the sabbatical overall—its interlocking impact on interim leaders and other managers, board members, and the executive leader.

PREPARING FOR SUCCESSION

Nonprofits in general tend to resist succession planning. Boards worry they will lose good leaders, and leaders fear they will send the wrong message to their boards, staff, and funders. However, the culture regarding these barriers is slowly shifting as sabbaticals force a form of succession planning—preparing managers to lead while the ED is on a three-month leave.

In fact, post-sabbatical, a small number of awardees do leave their organizations. More often than not, the sabbatical helps support a positive, well-planned transition. In some cases, a sabbatical has helped make clear that the person who acted as interim would be the right choice to take

over the ED position permanently.

In others, interims—and their organizations—have realized they wouldn't be a good fit for the job.

Organizations can use sabbaticals in many ways beyond creating a respite for the awardee—to support leadership from within, for example, and to try out interim leadership, enable boards to gain greater perspective, and strengthen the bench. They may also experience

unintentional ripple effects from sabbaticals, but when organizations go about strengthening, testing, or experimenting with leadership in a purposeful way during the absence of the executive, they gain even more.

“I was able to see more clearly how public education of the larger community and advocacy fit into our mission statement... the sabbatical helped me to see how much can be accomplished with volunteers.”

- INTERIM LEADER

INTERIM LEADERS

Of the survey participants who took over as interim leaders of their organizations while the ED was on sabbatical, 50% say their experience provided them with a new vision for the organization, and 80% of those have been able to influence the organization to take on all or parts of their new vision.

A small number of interims report the experience was too difficult. Some believe they were not prepared well enough in advance or that they carried two jobs instead of one for three months. Some did not feel prepared for the reentry of the leader.

Others chafed when a leader returned unchanged or did not listen to the experience of the interim and the other staff left behind. A minority experienced insights into dysfunction, either with the leader or with the organizational culture.

Not Everyone Wants to Be a Leader

A sabbatical can clarify what the ED's responsibilities actually are—important information to have when looking for a successor. And interims can decide if the ED's job is really what they aspire to. Too often, organizations groom someone internally for eventual succession to the ED's position, only to learn at the last moment that the candidate has no interest in the job.

The career pathways of interim leaders may be “up” within the organization. However, very few interims have gone on to replace the executives participating in this study. So although there are many positive experiences and lessons for interim directors, there is no data indicating that they are more likely to become executive directors as a result.

Again, while 90% of the 30 interim respondents enjoyed their interim experience, the impact on them varied tremendously, ranging from affirming a desire to become a leader on their own to confirming that they wish to remain in their current positions.

For smaller organizations with only two or three staff members or for organizations that cannot off-load the interim's work to other staff, providing the interim with an opportunity to experience the executive director position from the inside-out may be too stressful for all concerned. In these cases, it may be wiser to allow organizations to choose between an experienced outside interim and an internal interim leader.

It is clear that better prepared interims, working in organizations with healthy cultures, as well as leaders and board members who support them in their role, have a more positive experience.

A Tale of Transition

Chevy Humphrey is the president and CEO of Arizona Science. She worked as the organization's executive vice president and COO when she became a sabbatical awardee. (The Piper Trust provides sabbaticals at both the executive and other leadership levels within nonprofits.) Humphrey's organization used the sabbatical as a way for her, as future leader, to prepare personally for stepping up to the CEO position. Prior to the sabbatical, the organization also offered professional training for key staff.

“The sabbatical played a huge role in the transition process,” Humphrey writes. “It prepared me both personally and professionally for this new undertaking, and I was able to prepare my supervisees through professional development to take on more of my COO responsibilities and feel confident that they could handle things during my leave.”

The Challenges of Sabbaticals

Although sabbaticals offer numerous benefits to individuals and organizations, 35% of survey respondents report some negative impacts or challenges resulted from their award. Most of these were minor or unique to individual applicants, as for example, a leader who missed the graduation ceremony of one of the organization's programs. However, a more general theme surfaced around the way in which a sabbatical sometimes uncovers areas of organizational weakness, such as those listed below.

Challenges for Awardee Organizations

- Over-dependence upon the leader as lead fundraiser (with no one stepping up during his or her absence)
- Increased strain on an already under-capitalized nonprofit, which results in a particularly stressful experience for the interim leader
- Organizational politics, such as described by one awardee: "A power vacuum was created and a couple of employees took advantage"
- A realization that a leader on sabbatical is no longer quite the right match for his or her organization, which may lead to the leader's resignation as an unintended consequence

One interesting challenge for some organizations is the "creative tension that bursts forth," as one awardee put it. Some awardees were surprised to discover some level of conflict or creative tension when they returned—their very absence from the role of the "gatekeeper" who paced the action and managed what was discussable and not discussable had resulted in a release of pent up energy. Although this outcome can seem negative on the surface, if well managed, it can actually work out as a long-term advantage for an organization. The new energy can be disorienting, especially when it seems to be fueling conflict, but the insights it engenders in previously un-discussable areas can lead to growth in organizational capacity.

A WIN/WIN FOR PHILANTHROPY

Foundations funding sabbatical programs have enjoyed several key benefits, such as developing deeper relationships with leaders of grantee organizations, building good will, and experiencing new insights into issues with which grantees grapple.

Developing Deeper Relationships

Sabbaticals focus more intensively on grantees/leaders than do most grant programs. A leader who receives a sabbatical award, then uses a foundation's support to prepare for his or her absence, and finally participates in alumni convenings often develops a strong, trusting relationship with the foundation's leadership.

Building Good Will

These strengthened relationships facilitate direct feedback from awardees to the foundation. For instance, staff at the Barr Foundation find that sabbatical alumni feel more empowered to critique the foundation in a constructive way and are more confident to do so than are other grantees. Getting this kind of honest input can be invaluable for foundation staff. The Durfee Foundation's program began 12 years ago. In that time, they have developed long-term relationships that have resulted in nonprofit leaders who remain trusted advisors to the foundation years after they took their sabbaticals. In addition, Durfee uses the sabbatical alumni as a brain trust to help in many aspects of their work. For example, alumni assist in developing new grant programs or in rethinking current ones.

Experiencing New Insights

At alumni gatherings, in particular, foundation staff can see the interconnections among different funding areas better as they watch leaders interact and ask questions of each other. This sometimes leads to awardees working with other nonprofits outside of the foundation's giving area. This too can create opportunities for new insights. For example, the Barr Foundation does not fund community development corporations (CDCs) or the affordable housing field in general. Barr does fund environmental organizations. Because of what Barr staff learned in listening to the exchanges among some environmental grantees that assist CDCs with green technologies, Barr has now decided to fund some CDCs for their environment-related work. It would not have done so without the knowledge gained through its sabbatical program.

Tamara J. Woodbury and the Girl Scouts-Arizona Cactus-Pine Council

A CASE IN POINT:

If there is a poster child for what an already extraordinary leader can do with a little time for reflection and rejuvenation, it is Tamara Woodbury. Quite simply, she is at the heart of a “re-founding” or reinterpretation of Girl Scouting’s tenets, both in Arizona, where she works as ED of the Girl Scouts-Arizona Cactus-Pine Council, and nationally.

Woodbury grew up in a conservative environment where joining the Girl Scouts, with its stated mission of empowering girls, was “an act of defiance.” However, scouting served as an oasis in the desert for her. She describes her scouting experience as the first time she was seen for “who I am” and that her talents were recognized. As a young woman studying to become a doctor, Tamara decided to “gift back” to the Girl Scouts by volunteering at a local council. That decision changed her life. She never returned to her study of medicine.

Twenty-seven years later, she was still with the Girl Scouts and had become an executive director in the organization. Today, Woodbury describes herself as a lifelong learner, and when one of her colleagues at the time recommended that she apply for The Virginia G. Piper Charitable Trust sabbatical program, she saw it as an opportunity to receive some education that the Council could not afford to offer.

She designed her sabbatical in two parts. The first enabled her to follow her deep interest in learning organization theory by going through a program at the Society of Organizational Learning (SoL) Institute in Halifax, Nova Scotia. The second was a four-week retreat to her cabin in Flagstaff, where she spent mornings reading and writing and afternoons hiking and relaxing. What Woodbury thought and wrote about during her sabbatical has led to nothing short of a transformation for the Cactus-Pine Council. This has led to a ripple effect that seven years later is still deeply altering the organization’s culture, practice, principles, and effectiveness.

Woodbury began her post-sabbatical work with the Council by engaging staff and board in a deep listening project.

The Council sought information from their 9,200 volunteers (working with 26,000 Girl Scouts). They discovered the volunteers did not believe the Girl Scout Council trusted them, as evidenced by the high number of regulations and requirements reinforced through language in written materials. The Council reviewed its own “organizational artifacts,” and staff and board members were “amazed at both the language we had chosen to employ and the bureaucratic barriers we had unintentionally established—all in the ‘best interest’ of our organization.”

Woodbury then embarked on a five-year (r)evolution, still in process, to embed a new culture into the Council—one that relies deeply on the 1912 founding “spirit of love” and mission of Juliette Low. This work says that today the Girl Scouts’ job is to “build deliberate environments where acceptance of each girl is primary, where adults and peers really listen to the girls’ questions and needs, where girls can explore the things that matter most to them, and where preteens and teens learn to hear and trust their own inner guidance.” Programmatically the council began a shift from *telling* girls how to be leaders to helping girls *source* their leadership from the inside-out. It now employs new techniques like storytelling and intergenerational support through elder circles of women who have been Girl Scouts or otherwise attained the wisdom that comes from living a full life—employing these new techniques to help every girl in “authoring her own life.”

Woodbury’s seeing—or emergent thinking—led her to articulate her thoughts in writing. This writing then manifested into actionable steps that shifted the organizational culture at Cactus-Pine Council to focus on the inside-out of girl’s leadership development by changing its policies, systems, management structures, and language. The result has been an ongoing process of managing change from a culture of conformity, restraint, and risk aversion to one of unleashing the human spirit and tapping into that spirit as the organization’s most renewable resource.

BEST PRACTICES IN SUPPORTING SABBATICAL PROGRAMS

For foundations or other funders interested in starting a sabbatical awards program, a snapshot of recommended best practices follows. These practices have emerged from interviews with staff at the five participating sabbatical programs and with their consultants and evaluators, from interviews with their sabbatical awardees, from surveys of their sabbatical awardees and interim leaders, and from a review of previous studies.

Financial Support

All of the participating foundations in this study offer a grant ranging from \$25,000 to \$40,000 payable to the organization. This support primarily is intended to cover the executive director's salary while on leave, as well as travel or related expenses. Some foundations allow a portion of the grant to go toward organizational development support prior to, during, and after the sabbatical. Others provide a separate grant for organizational support.

Continuity of Foundation Program Staff

Staff continuity is important. Long-term staff of these programs, such as Madeleine Adamson at Alston/Bannerman and Claire Peeps and Carrie Avery at The Durfee Foundation, retain knowledge that builds from cohort to cohort and use this to improve their programs. In the case of the Z. Smith Reynolds Foundation, Jean McLendon has consulted to the project since its inception in 1991. She has a wealth of experience and wisdom from her years of working with sabbatical awardees. When foundation program staff turn over, this kind of ongoing relationship with a partnering consultant, documentarian, or evaluator can help capture lessons and build institutional memory.

These program officers each commented on the importance of staff (or intermediary) continuity for several reasons:

- There is both art and science to the sabbatical selection process (see below). The art is in developing “wisdom” and a “human touch,” which can only happen over time. Making these awards requires sensitivity and some nuanced due diligence. Likewise, understanding how much to guide awardees while allowing them freedom to do as they wish with their extended time away from work is a skill that grows with experience.
- Intentionally and consistently capturing lessons helps preserve new knowledge from cohort to cohort.
- Foundation staff who have led sabbatical programs over a number of years build relationships with counterparts at other foundations in which lessons are shared and field-building studies are jointly funded.

Selection Process

Foundations have a number of criteria or screens for their sabbatical programs. One criterion common to all programs is that these awards are for effective, proven leaders of nonprofits to provide them time away from work. The foundations providing sabbaticals have a variety of other standards for making their selections. The most typical are:

- A minimum length of service in their nonprofit and/or their field (e.g., the arts, human services, community development). Ten years of service is common, although some foundations require five years of service and others have no minimum requirement.
- Geography. This is defined by the foundation's grant making region.
- Types of nonprofit fields. Foundations typically provide sabbaticals to leaders of organizations that fall within their usual giving areas.
- Staff position in the nonprofit. Sabbaticals are most frequently thought of as awards for executive directors; however a number of programs provide sabbaticals to staff in different roles.

As one program officer said, "The selection process is not neutral." If the above guidelines are fairly value neutral, the art of selection comes into play when balancing for gender, age, race, and ethnicity among those eligible and when considering timing, organizational stability, and "need" for a break. For foundations that convene an awardee cohort periodically, some thought is given to the mix of leaders with respect to leadership style and role in a given group.

Application Process

The majority of foundations rely on a multipart application and screening process. Some of the foundations, such as Durfee, do selection by committee. Some do site visits, but not all. Durfee staff speak to the importance of the site visit as a way of understanding what impact the organization may experience during the leader's absence and how supportive staff are toward the leader. In the final analysis, this insight can help identify the more effective leaders for selection.

Four of the five programs have an application process in which potential candidates apply and are selected in a competitive process. One program selects through an anonymous process similar to the MacArthur "Genius" Award program, in which candidates are recommended by carefully chosen nominators.

FURTHER INSIGHTS FOR FUNDERS

- Guidelines strongly discouraging awardees from contacting their organizations during the leave time are important to creating a successful sabbatical experience.
- Families are also affected by sabbaticals. Some programs provide guidance to awardees' families to help plan for a sabbatical.
- The optimal sabbatical length is three to four months. Eight weeks of leave time doesn't seem to provide a restorative effect. It takes the third month to reach many of the outcomes outlined in this study. More than four months away can create a hardship on the organization and not necessarily increase the benefits it receives.
- Periodic evaluations have helped funders improve their protocols and create a reflective practice for foundation staff and awardees alike.

Key Supports for Awardee and Organization

There is a range of supports offered

by sabbatical programs to awardees, interim leaders, and staff. Key among these are:

- Pre-sabbatical orientation
- Support to the organization during the awardee's absence and in particular to the interim leader
- Reentry support for the awardee
- Organizational development support
- Convening of awardees

All of the participating programs have worked to strengthen pre-sabbatical orientation over time. The scope ranges from individual conversations to a full retreat for an awardee class. The orientation helps the awardee become aware of lessons learned from previous cohorts—for example, the importance of good personal pre-planning for the sabbatical, while also preparing the interim and the organization. Many of the programs have alumni speak to the current cohort and respond to questions about the experience.

Capacity building assistance for the whole organization and for the interim leader reinforces the message that the sabbatical is not just a gift to the awardee but that the organization will also grow as a result of the award. Some of the foundations included in this study provide such organizational support. Several of the funders pay a consultant or a consulting firm to be on call and/or deliver assistance upon request during the sabbatical.

Some funders make formal coaching available to awardees pre- and/or post-sabbatical. Coaching before the sabbatical helps the awardee reflect upon how he or she wishes to use the time away. Post-sabbatical, coaches can assist awardees in clarifying their insights and incorporating lifestyle and work-style changes. Coaches can also help the interim leader and the staff identify and incorporate lessons learned into their daily operations.

The point of reentry is delicate for both the awardee and the organization. Sixty-two percent of awardees report receiving advice on how to best re-enter the organization—typically as a listener—and how to solidify the positive impacts of the sabbatical.

Convening

As described in the section on organizational impacts, one key role the foundation plays is in convening program alumni—at least once a year. Conveners recommend devoting part of the agenda to building connections among the awardees and part as “open space” for whatever content emerges from the group.

SUPPORTING CREATIVE DISRUPTION

Retaining talented, experienced leaders is essential to maintaining healthy nonprofit organizations—especially now, in an economic climate that has put the very survival of many of these organizations at risk. However counterintuitive it may seem, sabbaticals can help. They represent an effective and cost efficient way not only to revitalize leaders' passion and interest in their work, but at the same time increase the capacity of their organizations, develop a second tier of leadership, reframe vision, transmit executive skills to staff, improve board governance, and stimulate closer relationships with funders. Unfortunately, despite the long list of benefits, few philanthropies currently offer grants for this purpose.

We hope the data from our report will clear up any misapprehensions about sabbaticals and will provide the evidence-based support that foundations need to initiate new programs to fund them. These programs offer an extraordinary opportunity to make a demonstrable, positive impact in the lives of nonprofit leaders, their staff, and the communities they serve.



Alston/Bannerman Fellowship Program

The Alston/Bannerman Fellowship Program seeks to advance progressive social change by helping to sustain organizers of color by giving them time for reflection and renewal. Started in 1988, it has provided 185 fellowship awards on an annual cycle of 4 to 10 a year. www.AlstonBannerman.org

Alston/Bannerman Fellowship Program
1627 Lancaster Street
Baltimore, MD 21231
Phone: 410.327.6220
info@Alston/Bannerman.org

Barr Foundation Fellows Program

The Barr Foundation Fellows Program seeks to create a diverse leadership network that has an impact on the quality of life in Boston, rejuvenate outstanding executive directors, provide emergent leaders with development opportunities, and strengthen organizations in the areas of distributed leadership and succession planning. The Barr Fellows Program has funded three cohorts (2005, 2007, and 2009) of 12 Fellows each. www.barrfoundation.org

Barr Foundation
The Pilot House
Lewis Wharf
Boston, MA 02110
Phone: 617.854.3500
info@barrfoundation.org

The Durfee Foundation Sabbatical Program

Developed in 1997, the Durfee Sabbatical Program seeks to replenish the stores of energy and inspiration for the community's most gifted leaders. Six sabbaticals are provided annually; 76 have been provided to date. www.durfee.org

The Durfee Foundation
1453 Third Street, Suite 312
Santa Monica, CA 90401
Phone: 310. 899.5120
admin@durfee.org

The Virginia G. Piper Charitable Trust Fellows Program

The goal of the Piper Fellows program is rejuvenation and professional development for executives. The program began in 2001 and has awarded 23 fellowships to date. www.pipertrust.org

Virginia G. Piper Charitable Trust
1202 East Missouri Avenue
Phoenix, AZ 85014
Phone: 480. 948.5853
info@pipertrust.org

Rasmuson Foundation Sabbatical Program

The Rasmuson Sabbatical Program was founded in 2004 for the personal growth or renewal of leaders in order to combat job related stress and burnout. The sabbatical is available to executive directors and chief executive officers who work for health and human service organizations. Four to six sabbaticals are provided during an annual cycle; 15 have been provided to date. www.rasmuson.org

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